



DEVELOPMENT OF CULTURAL SERVICES WITHIN THE KNOWLEDGE ECONOMY – CASE STUDY ON THE ROMANIAN MUSEUMS

Andreea Zamfir and Răzvan-Andrei Corboș

The Bucharest Academy Of Economic Studies, Romania

Since services are a dynamic component of economic competition and culture holds a prominent place in the lives of Europeans, it is reasonable to investigate the issues related to cultural services. This study explores how the knowledge economy could influence the development of cultural services. Firstly, this study discloses the changes in conceptions on culture and cultural services within the knowledge economy. Secondly, it reveals the framework for delineation between the cultural sector and the creative sector. Thirdly, this study reveals an analysis of the perceptions on cultural services within the European Union, and fourthly, it offers a case study about Romanian museums. The findings of this study disclose that the conceptions and management practices in the cultural services sector have considerably changed during the past few years due to the knowledge economy. The study was carried out by combining a wide variety of sources, such as statistics, research reports, articles and books. The results reported in this research may be used for policy making and for exploring new development opportunities in the cultural services sector.

Keywords: Culture, Cultural services, Cultural market, Information and communication technologies, Romanian museums.

Introduction

The knowledge economy has more or less changed the conceptions on culture, cultural services and cultural goods, having a wide range of implications for management practice. The topic of culture and cultural services is highly debated nowadays and is a leading point on the political agenda, as services became the main dynamic component of economic competition and culture is perceived as being important in people's life. Therefore, this study investigates how the knowledge economy could influence the development of cultural services. In this respect, this study firstly discloses the changes in conceptions on culture and cultural services within the knowledge economy, and secondly, reveals the framework for delineation between the cultural sector and the creative sector. Thirdly, this study reveals an analysis of the perceptions on cultural services within the European Union, and fourthly, it exposes a case study on the Romanian museums.

The research was conducted using a large variety of sources, such as statistics, research reports, as well as articles and books. The research question was answered by analyzing published sources, reorganizing concepts, and by evaluating and interpreting evidence. Answering the research question was difficult, due to the variety of approaches, concepts and definitions found in the literature.

Changes in Conceptions on Culture and Cultural Services within the Knowledge Economy

Culture”, “cultural industries”, “creative industries”, “cultural and creative sectors”, “cultural goods” or “cultural services” are words and phrases commonly found in the literature when searching for subjects related to this sensitive sector of the economy: the cultural sector. The reason for this may be found back in 1976, when Williams argued that the term “culture” “is one of the two or three most complicated words in the English language” (Williams, 1976: 76). The abundance of definitions, meanings and implications even after more than 30 years from then allows us to agree that Williams’ statement has proved to be true.

The action of defining the concept of culture was very delicate, given the heterogeneity of this kind of activities, as well as many different meanings of the term “culture” in everyday life. Defined in its broadest sense, the notion of culture encompasses a wide range of idiosyncratic meanings: historic, political, legal, technological and artistic (Santagata, 2002: 1). According to Garnham (1987: 54), culture may be defined as “a realm separate form, and often actively opposed to, the realm of material production and economic activity”.

Culture represents the anthropological image of the material, spiritual and social life of a people (Santagata, 2002: 1). Furthermore, culture has been increasingly seen as an important resource for sustainable economic growth and for the achievement of a wide variety of policy goals from those of urban regeneration to health (Santagata, 2002; Gray, 2006). However, there is still no general agreement on how to delineate the cultural sector, neither in the narrower sense of those engaged in traditional “cultural” activities nor in the broader sense of those whose activities draw on inspiration and creativity, that are the creative industries (Centre for Strategy & Evaluation Services, 2010: 14).

Regardless of the perspectives taken into account, the definition of culture may be sought in the sphere of activities which have generated these cultural outcomes, which means finding those elements of their identification and delineation from other economic activities. The starting point is the delineation between cultural goods and cultural services, as some cultural outcomes may be considered goods, and others may be considered services.

Most definitions found in literature emphasize the fact that services are activities whose result is immaterial and cannot be stored, activities not materialized in products (goods) with self-standing existence (Zamfir, 2010: 52). As a result, cultural goods would include only visible tangible articles of trade like videos, books and sound recordings, while cultural services would include only invisible or intangible products such as broadcasts, film and video distribution rights, and contracts for live artistic performances (Paul, 2000: 40).

Starting from the tangibility/intangibility feature of goods/services, culture may be divided into two dimensions: the material dimension and the valuative dimension. According to Gray (2006: 102), the material dimension of culture is made up of specific resources (ranging from museums to children’s playgrounds to wildlife habitats) and activities (such as writing and countryside recreation), while the valuative dimension of culture consists of less tangible factors that are assumed to be present amongst society’s members (such as “shared memories, experiences and identity”, “diverse cultural, religious and historic backgrounds” and “what we consider valuable to pass on to future generations”).

Furthermore, an increasing number of services take now a tangible form (e.g. editorial services, information services stored on CDs, DVDs, etc.). Some services have a material expression (tangible part) which has a specific self-standing form (CDs, DVDs, etc.), but the intrinsic value of information contained is clearly superior to the value of the tangible part. As a consequence, the tangible/intangible forms of the activity’s result as a criterion of demarcation between goods and services becomes questionable (Zamfir, 2010: 53). In this respect, cultural goods may consist of tangible or intangible items of cultural significance, such as heritage buildings, sites, locations, works of arts (e.g., paintings, sculptures), literature and music, etc. On the other hand, cultural services may include all cultural performances provided by cultural institutions that may take many different forms, such as visits to museums, attendance at concerts or reading books (Cheng, 2006: 264).

Delineation of the Cultural Sector and Creative Sector

Culture is a capital asset accumulated by a community whose members refer to it to connote their identity (Santagata, 2002: 1). There is a stock of cultural goods, denoted as cultural capital, which is inherited from the past and there is an ongoing process of creating new cultural goods, which are then added to the stock. Moreover, the meaning and importance of cultural heritage for society is closely linked to the number and kinds of cultural services flowing from the stock of cultural goods (Cheng, 2006: 264). This cultural capital, tangible and intangible, enters the production of material and immaterial culture-based goods through two strategic inputs: human creativity and human intellectual activity (Santagata, 2002: 1). Hence, there is a strong need to distinguish between the cultural sector and the creative sector.

Figure 1. Delineation between the cultural sector and the creative sector.

CIRCLES	SECTORS	SUB-SECTORS	CHARACTERISTICS
CORE ARTS FIELD	Visual arts	Crafts Paintings – Sculpture – Photography	<ul style="list-style-type: none"> • Non industrial activities. • Output are prototypes and “potentially copyrighted works” (i.e. these works have a high density of creation that would be eligible to copyright but they are however not systematically copyrighted, as it is the case for most craft works, some performing arts productions and visual arts, etc).
	Performing arts	Theatre - Dance – Circus - Festivals.	
	Heritage	Museums – Libraries - Archaeological sites - Archives.	
CIRCLE 1: CULTURAL INDUSTRIES	Film and Video		<ul style="list-style-type: none"> • Industrial activities aimed at massive reproduction. • Outputs are based on copyright.
	Television and radio		
	Video games		
	Music	Recorded music market – Live music performances – revenues of collecting societies in the music sector	
	Books and press	Book publishing - Magazine and press publishing	
CIRCLE 2: CREATIVE INDUSTRIES AND ACTIVITIES	Design	Fashion design, graphic design, interior design, product design	<ul style="list-style-type: none"> • Activities are not necessarily industrial, and may be prototypes. • Although outputs are based on copyright, they may include other intellectual property inputs (trademark for instance). • The use of creativity (creative skills and creative people originating in the arts field and in the field of cultural industries) is essential to the performances of these non cultural sectors.
	Architecture		
	Advertising		
CIRCLE 3: RELATED INDUSTRIES	PC manufacturers, MP3 player manufacturers, mobile industry, etc ...		<ul style="list-style-type: none"> • This category is loose and impossible to circumscribe on the basis of clear criteria. It involves many other economic sectors that are dependent on the previous “circles”, such as the ICT sector.

	: “the cultural sector”
	: “the creative sector”

(Source: KEA European Affairs, 2006: 56)

An authentic framework for the delineation of the cultural sector and creative sector (figure 1) was established in the study on “The Economy of Culture in Europe” undertaken by KEA European Affairs for the European Commission and completed in October 2006. Moreover, this delineation was also embraced by the authors of the “Study on the Contribution of Culture to Local and Regional Development – Evidence from the Structural Funds, Final Report” conducted by the Centre for Strategy & Evaluation Services in 2010.

According to KEA European Affairs (2006: 53-54), the cultural sector consists of art fields and cultural industries, whose outputs are exclusively “cultural”, while the creative sector gathers the

remaining industries and activities that use culture as an added-value for the production of non-cultural products.

Within this framework, the economy of culture is seen as a “radiation process”, that is “a model of the cultural industries centered around the locus of origin of creative ideas, and radiating outwards as those ideas become combined with more and more other inputs to produce a wider and wider range of products” (KEA European Affairs, 2006: 53).

Through the radiation process are identified different categories of activities/sectors covered by the economy of culture: (1) core arts field (the centre) constituted of non-industrial cultural products which include visual arts, performing arts, cultural and architectural heritage and literature; (2) cultural industries (circle 1) that are industries whose outputs are exclusively cultural, which include film, DVD and video, television and radio, video games, new media, music, books and press; and (3) creative industries (circle 2) that are those industries which use culture as an input, but whose outputs are mainly functional, which include architecture, advertising, design and fashion. The main common element of the arts field, cultural industries and creative industries is that they embody ideas, values, and creativity which become concrete and tradable once protected by copyright. In addition, there is a third circle consisting of “related industries” that does not belong to the “cultural & creative sector”, but it is strongly linked to it. Although culture and creativity are not production inputs for the related industries within the third circle, these industries depend on cultural and creative products (KEA European Affairs, 2006: 53-54; Centre for Strategy & Evaluation Services, 2010: 14-16).

According to Eurostat (2011: 64), there are five main cultural sectors of the economic activity, namely: (1) publishing activities (NACE 58); (2) motion picture, video and television programme production, sound recording and music publishing activities (NACE 59); (3) programming and broadcasting activities (NACE 60); (4) creative arts and entertainment activities (NACE 90); and (5) libraries, archives, museums and other cultural activities (NACE 91).

This framework presented above provides an illustration of the economic impact of the cultural sector, showing that the contribution of “culture” may be both direct and indirect. Culture has a direct economic impact as a final consumption product. Also, culture has an indirect economic impact either because it brings elements of creativity into the production process of non-cultural goods or because the growth of some other economic sectors is directly linked to the production of cultural goods and services by the cultural sector (KEA European Affairs, 2006: 54).

Although the revenue model of different cultural activities is diverse, there are some common elements which are also specificities of this sector: (1) the products are often short lived with a high risk ratio of failures over success; (2) the products are marketed for local audiences with different languages but competing with international products with global appeal. The market structure of the cultural sector and in particular of cultural industries is therefore more complex; (3) the market is highly volatile, depending on fashion, trends and consumption uncertainties, and some sectors are strongly “hit driven” (cinema and music); and (4) the sector has an important social role as a major and attractive communication tool (KEA European Affairs, 2006: 35).

Based on these problems of the cultural market there are some authors that state the need of public policies and intervention in this field. For instance, Garnham (1987: 54) argue that public intervention, as subsidy, is justified on the grounds that: (1) culture poses inherent values (such as life enhancement) which are fundamentally opposed to and in danger of damage by commercial forces; (2) the need for these values is universal, regardless of class, gender and ethnic origin; and (3) the market cannot satisfy the need for these values.

The consumption of cultural services and the creation of cultural goods are not only beneficial for individual consumers, but also contribute to form a “better” or a “more cultivated” society that is valued by all its members irrespective of their own cultural-services consumption and cultural-goods creation (Cheng, 2006: 282). Moreover, along with knowledge-based goods, culture-based goods are at the edge of a new wave of economic progress based on glocalism (localized globalism) which has been made possible through information and communication technologies, conditions of increasing returns and new creative economics (Santagata, 2002: 1).

Perceptions on Cultural Services within the European Union

Regardless of how it is defined, culture holds a prominent place in the lives of Europeans. Based on the data of the Eurobarometer on European Cultural Values (67.1), an opinion poll conducted in 2007, and according to Eurostat (2011: 143), over three quarters (77%) of all persons surveyed answered that culture was important to them, while 22% considered that culture was unimportant.

With reference to the concept and understanding of culture (figure 2), among the responses to the question “What comes to mind when you think about the word “culture”?” the most common answer of Europeans was “Arts (performing and visual arts)”, with 39% of all persons surveyed. Performing arts include music, theatre, cinema, ballet, opera, etc., while visual arts include architecture, painting, art galleries, etc. In second place came “literature, poetry and playwriting”, together with “traditions, languages, customs and social or cultural communities”, each accounting for 24% of respondents. Less than 10% of persons surveyed associated culture with “values and beliefs” (Eurostat, 2011: 143).

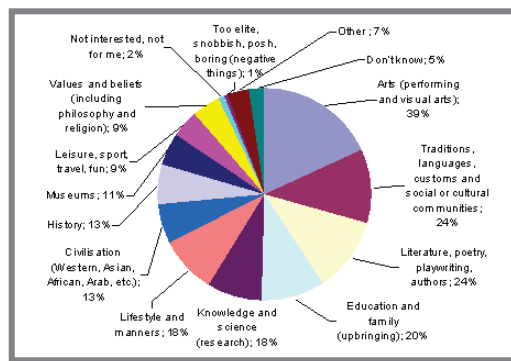
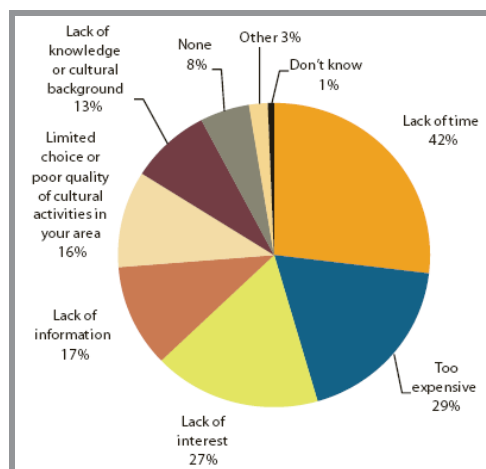


Figure 2. Concept and understanding of culture, EU-27, 2007.

(Source: Authors, based on data of Eurostat, 2011: 147)

Sometimes people find it difficult to access culture or to take part in cultural activities, due to different barriers (figure 3). The survey mentioned above has revealed that lack of time was considered as the main barrier to access culture, as expressed by 42% of respondents. Moreover, 29% of people surveyed answered that culture was too expensive and 27% showed a lack of interest in culture (Eurostat, 2011: 145).

Figure 3. Barriers in access to culture, EU-27, 2007

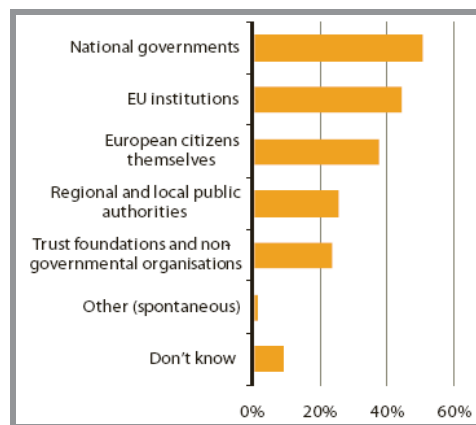


(Source: Eurostat, 2011: 149)

As regards the role of institutions in launching cultural activities and promoting cultural diversity (figure 4), a majority of respondents (50%) consider that national governments are in the best position to implement programmes to strengthen culture and cultural exchanges and promote cultural diversity, followed by EU institutions (44% of respondents), European citizens (37%), regional authorities (25%) and non-governmental organisations (23%) (Eurostat, 2011: 145).

Local authorities may be considered as an essential constituent of the mixed economy that supports culture. In many places, local authority employees directly interact with the public in venues, libraries, sports facilities and museums (Holden, 2006: 18).

Figure 4. Institutions involved in promoting cultural activities, EU-27, 2007.



(Source: Eurostat, 2011: 157)

Local authorities must give their full support to the maintenance of the cultural infrastructure and the growth of cultural activity. Culture is a public good, just as much as clean air, domestic security, public health and universal education. However, it is often treated as marginal rather than being seen as central to the lives of citizens and to the achievement of local authority aims (Holden, 2006: 9).

Case Study on the Romanian Museums

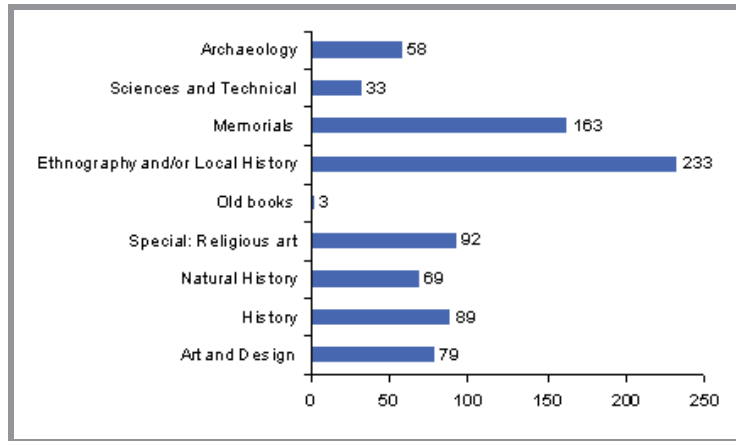
The arts field is a powerful tool for local development, for at least four reasons: (1) it is a sector of growth and a catalyst to the dynamism of creative cities; (2) it acts as a soft location element in a local economic policy aimed at triggering the establishment of companies and talented people; (3) it reinforces social integration and ensures territorial cohesion; and (4) it is a successful driver to attract tourists (KEA European Affairs, 2006: 35).

One of the constituents of the arts field is the sector of cultural heritage, a heterogeneous sector that includes heritage sites, museums and their collections, libraries and archives and archaeological sites. We have chosen to investigate in this section of the paper the sub-sector of museums in Romania because of the educational role of museums and the economic value they might provide to local authorities.

There are 819 museums in Romania (figure 5), of which 233 (29%) in the fields of ethnography and/or local history, 163 (21%) memorials, 92 (11%) in the field of religious art, 89 (10%) related to history, 79 (9%) in the fields of art and design, 69 (8%) in the field of natural history, 58 (7%) related to archaeology, 33 (4%) in the fields of sciences and technical museums, and 3 (almost 1%) museums of old books.

Given the heterogeneousness of the Romanian museums, they are playing an important role in educating visitors. However, the educational mandate of museums is being transformed nowadays due to management and marketing strategies that play an increasingly crucial role in promoting cultural services (Minghetti *et al.*, 2002: 131).

Figure 5. Number of museums in Romania.

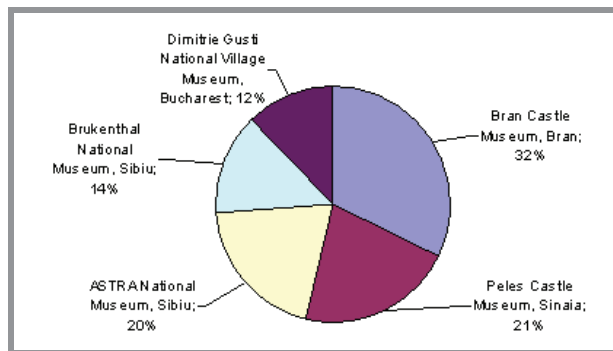


(Source: Network of European Museum Organizations, 2011)

The five most visited museums in Romania (figures 6 and 7) according to Eurostat (2011: 42) are the following: (1) Bran Castle Museum in Bran (32% of visitors); (2) Peles Castle Museum in Sinaia (21%); (3) ASTRA National Museum Complex in Sibiu (20%); (4) Brukenthal National Museum in Sibiu (14%); and Dimitrie Gusti National Village Museum in Bucharest (12% of the total number of visitors).

On the supply side competition is growing every day and museums contend with other cultural institutions to draw the highest volume of visitors. The reduction of state funding forces them to opt for economy-oriented management schemes, in order to self-finance cultural events. Although the sector of museums is essential to Romania’s memory, history and identity, figures on its economic value are almost non-existent. At the same time, museums suffer the spread of an array of indoor and outdoor entertainment activities that compete with traditional cultural services for the visitor’s leisure time (home multimedia, theme parks, amusement and shopping arcades, etc.) (Minghetti *et al.*, 2002: 133).

Figure 6. Five most visited museums in Romania.



(Source: Authors, based on data of Eurostat, 2011: 42)

Bran Castle is a national monument and a landmark in Romania. Surrounded by an aura of mystery and legend, Bran Castle owes its fame to its imposing towers and turrets as well as to the myth created around Bram Stoker’s “Dracula”. Commonly known as “Dracula’s Castle” due to the persistent myths that it was once the home of Vlad Tepes, ruler of Walachia, although there is no evidence that Stoker knew anything about this castle, it was first documented in 1377. Bran Castle conjures up the perfect Gothic fairy-tale image of a Transylvanian castle and as a result it is an attraction to many tourists. From 1920 to 1957 Bran served as royal residence, a gift of the people of Brasov to Queen Marie of Romania. The castle is now a museum open to tourists, displaying art and furniture collected by Queen Marie. The castle overlooks the picturesque village of Bran, which offers an open-air ethnographic museum

consisting of old local-style village houses complete with furniture, household objects and costumes (Compania de Administrare a Domeniului Bran, 2011).

Peles Castle is one of the most representative museums of Romania, built between 1873 and 1914 on an existing medieval route linking Transylvania and Wallachia. The castle was built at the initiative of the first King of Romania, Carol I of Hohenzollern-Sigmaringen, to serve as a royal summer residence, with political, cultural and symbolic functions. Since 2007, His Majesty, King Michael I of Romania holds the property of the castle, which is, at the same time, a public institution under the authority of the Ministry of Culture and National Heritage. The visitor of the Peles Castle has the opportunity to know a page of Romania's history and to admire the artistic patrimony of this museum, with pictures, sculptures, carpets, and furniture (Muzeul National Peles, 2011).

Figure 7. Famous museums in Romania.



“ASTRA” National Museum Complex is the most important ethno-museum institution in Romania, including four museum units of ethnographic profile: (1) “ASTRA” Museum of Traditional Folk Civilization, or the Open Air Museum; (2) “Franz Binder” Museum of Universal Ethnography; (3) “ASTRA” Museum of Transylvanian Civilization; and (4) “Emil Sigerus” Museum of Ethnography and Saxon Folk Art. “ASTRA” Museum of Traditional Folk Civilization is the most important museum unit of the complex, and the largest open air ethnographic exhibition in Europe. The museum currently has over 400 monuments of folk architecture and technique, as well as an impressive collection of ethnographic heritage objects. Conceived as a living museum, it hosts many traditional events such as: traditional fairs, folk festivals, workshops, performances, handicraft trainings, team buildings, and other recreational activities. “Franz Binder” Museum of Universal Ethnography is the first and the only museum in Romania until now with the aim to present to the public various aspects belonging to the world peoples’ culture, civilization and art. It introduces the perspective of the non-European as a knowing alternative and emphasizes the “difference” as an element of cultural identity. “ASTRA” Museum of Transylvanian Civilization is conceived as a pluri-ethnic and interdisciplinary museum, its main goal being to define the multiculturalism of a European region with a pluri-ethnic, multiseccular coexistence, as well as to highlight these European values and ethnic community in particular. It has initiated and applied the modern concept of “museum vivum” or “living museum”, with the aim to rescue, recover and conserve the folk culture. “Emil Sigerus” Museum of Ethnography and Saxon Folk Art

conserves over 8900 objects, in 3 collections: folk costumes-textiles-embroidery, painted furniture and ceramics (Complexul National Muzeal ASTRA Sibiu, 2010).

Brukenthal National Museum includes Brukenthal Palace and the collections put together by Baron Samuel von Brukenthal, Governor of the Principality of Transylvania between 1777 and 1787. Over time the Brukenthal Museum was enriched with new collections and museums: the Museum of Natural Sciences (1957), the “August von Spiess” Museum of Hunting (1966), Museum of Pharmacy (1972), the History Section of the Brukenthal National Museum (1988), which was transformed in the Museum of History, and the Contemporary Art Gallery (2006) (Brukenthal National Museum, 2009). It is to mention that in 2010 the Brukenthal Museum has been awarded with Europa Nostra Award, the European Union prize for Cultural Heritage, at Category 4 “Education, Training and Awareness Raising” for “Discovering the Museum” programme. This project has been awarded for the exemplary pedagogical approach used in developing the museum’s educational programmes aimed at attracting the younger public. Moreover, the project’s intercultural aspect, as well as the outstanding scientific base of the publications produced, might be an excellent example for changing a classical museum approach into a tool of awareness-raising (Brukenthal National Museum, 2010).

Dimitrie Gusti National Village Museum was founded in 1936 at the initiative of Professor Dimitrie Gusti, the Head of the Department of Sociology from the University of Bucharest. The museum reflects Gusti’s theory regarding the permanent connection established between “knowledge” and “action” as dynamic line of life in human communities. The exhibition area is organized on two main principles: (1) authenticity, meaning that all exhibits, buildings and interior pieces are original; and (2) the exhibits sequence follows Romania’s historical regions sequence, so that the visit to the museum starts with specific constructions from the north of Transylvania, and it ends with traditional households in northern Moldavia; through this complete tour of the country, the visitors may compare the traditional Romanian architecture regarding the aesthetic impact, techniques and construction materials used by locals in building their houses (Muzeul National al Satului “Dimitrie Gusti”, 2011).

It is to point out that of the five museums considered, only three have websites in English (Bran Castle Museum, ASTRA National Museum Complex, and Brukenthal National Museum), the other two having websites only in Romanian (Peles Castle Museum and Dimitrie Gusti National Village Museum). Therefore, we strongly recommend the translation of museums’ official websites not only in English, but also in other foreign languages, so as to increase information availability and to attract a bigger number of foreign visitors. Furthermore, museums may rely on multimedia information systems in order to redesign their traditional products and to promote new cultural experiences. Multimedia information systems allow museums to involve a worldwide network of potential visitors in the production of the cultural service.

Development of information and communication technologies has created the premises for better collaboration and communication between service organizations, on one hand, and between them and their clients, on the other hand. Information and communication technologies can offer the degree of flexibility and adaptability of services to the clients’ needs (Zamfir, 2010: 84-85). Virtual exchange of information reduces the time and personnel needed and coordinates the transactions that take place between the units of a company (Hotaran, 2010). Consistent with Minghetti *et al.* (2002: 133), through the Web the museum “breaks” the traditional value chain in the sense that it enhances its role from being just a “commodity” that adds value to local tourism services marketed by travel agencies, hotels, and other tourism operators to becoming the catalyst of an innovative “niche” supply developed around the cultural event. Moreover, if effectively integrated in the service process, new technologies could actively support the development of strategies related to innovation, collaboration and value co-creation, playing a key role in providing competitive services (Zamfir, 2010: 85).

There are two socio-economic spin-off effects of heritage in general, and of museums in particular, that must be emphasized: (1) the creation of local jobs and the development of corresponding skills, which is the most evident economic impact of the sector; and (2) the increase of local attractiveness and the production of significant “returns on investments” due to the transformation of territories and cities through the improvement of buildings. The sector is generally thought to be non-profitable and it is presented as being heavily supported by “the public purse” (KEA European Affairs, 2006: 303).

According to Minghetti *et al.* (2002: 133), nowadays visitors are expecting varied and customized cultural experiences, whose value not only depends on the quality of the exhibit, but also on a set of complementary facilities (accessibility, information/booking, bookshop, cafeteria/restaurant, merchandising, etc.) that enhance the attractiveness of the cultural service.

Conclusions

The study has illustrated that the conceptions and management practices in the cultural services sector have considerably changed during the past few years due to the knowledge economy. This conclusion is based on the following premises: (1) there is a wide range of changes in conceptions on culture and cultural services within the knowledge economy; (2) development of cultural services and the enhancement of the cultural sector have imposed the creation of a new authentic framework for delineation between the cultural sector and the creative sector; and (3) national governments, European Union's institutions, as well as regional and local public authorities have now, may be more than ever, an essential role to play in launching cultural activities and promoting cultural diversity.

Another conclusion of this study is that the heterogeneousness of the Romanian museums may help playing an important role in educating visitors as long as there are appropriate management and marketing strategies implemented. Moreover, these strategies may benefit of the development of information and communication technologies so as to lead to providing competitive cultural services.

The results of this study may be used for further research regarding the options for reviving the cultural services sector and for exploring new development opportunities in the cultural services sector.

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