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CULTURAL HERITAGE POLICY
IN THE FIELD OF IMMOBILE MONUMENTS
IN POLAND
ON THE EXAMPLE OF
THE MASOVIAN VOIVODESHIP

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Doctoral dissertation abstract

Aim and methods

The dissertation is aimed at an institutional analysis and an analysis of the development of the immobile (historic) monuments policy in Poland, in an international perspective and with particular emphasis on the situation in the Masovian Voivodeship.

From the theoretical point, the work is based on the triangulation of perspectives and research methods of three models of public policy, i.e. the incremental model, the innovation and diffusion model and the Institutional Analysis and Development Framework, as well as on the perspective of the New Institutionalism and the Sociology of Culture.

From the methodological point of view, it is also based on the triangulation of research methods. The following were used: desk research, literature analysis, analysis of legal acts, analysis of social research reports, analysis of specialist reports in the field of monuments conservation, CATI questionnaire research on a representative sample of Polish society and the questionnaire study on the full population of local government units in the Masovian Voivodeship.

Immobile monuments policy

The immobile monuments policy is one of the specific policies of the cultural heritage policy, which is a part of the state's cultural policy and the nation-building policy. The policy of cultural heritage is an umbrella policy for specific vertical policies: the immobile monuments policy, the mobile monuments policy, the archaeological monuments policy, the intangible heritage policy, the policy of heritage of exceptional value, the policy towards difficult heritage and the policy towards endangered heritage. It is also a horizontal policy for other state activities.

The immobile monuments policy is a formal institutional solution for the state and society working together to identify, organize, visualize, preserve and pass on to the next generation of a collection of historical immobile objects relevant to the cultural heritage of the heritage community, and to some extent culturalization in its scope. The main objective of the policy of immobile monuments is to pass on to the next generation a collection of immobile monuments in at least good technical condition and the authenticity of physical substance and form, as well as shaping the awareness and attitudes of a new generation and educating new staff for the continuity of care over the historic resource, i.e. culturalization in this extent.
An immobile monument is a material object and an institution, i.e. a network of rules. It realizes specific values and is itself a value: value-object, value-symbol, value-carrier of symbolic meanings. Nowadays, the key and constitutive rule of monuments is their realization of historical value. However, they were also assigned and attributed other values for which they are also protected, that is: aesthetic and artistic, social, spiritual, place identities, political, economic and for local development.

Nowadays, in the law of the Republic of Poland, an immobile monument is understood as real estate, its part or a group of real estates, being a work of man or related to his activity and being a testimony to a bygone era or event, the preservation of which is in the public interest due to its historical, artistic or scientific value. Currently, the stock of immobile monuments in Poland involve: 16 objects inscribed on the UNESCO World Heritage List (some group objects, 1 natural heritage object), 6 objects marked with the European Heritage Label (including 2 mobile monuments, although their locations are given in specific cities), 157 objects recognized as Historic Monuments (107 entries), 77.5 thousand objects in the Register of Monuments and 193.7 thousand objects in the Domestic Record of Monuments.

Main work findings

The central thesis of the work indicates that the policy of immobile monuments in Poland is based on socially approved values and built on the principle of subsidiarity based on the systems of monument protection and care for monuments created by entities from the public, civil and private sectors. The conducted research and analyses confirmed this thesis.

First of all, the work shows that the policy of immobile monuments in Poland is grounded in the meta-values of Polish culture and the Polish nation. The foundations of this policy were shaped in a long historical process from the beginning of the 19th century. They were influenced by the trauma of partitions of polish state (1772, 1793, 1795), World Wars (1914, 1939) and the period of the Polish People's Republic (1945-1989). The paper discusses the social provenance of this policy from the 19th century in a narrative manner. It also presents its development, which had innovative-diffusion and incremental features. The emerging innovations in Polish arena were referred into those existing on the European arena. Generative and regulative rules and their changes from the first Polish legal act protecting monuments (1918) to the current act (2003) have been thoroughly described. Current Polish arena of the immobile monuments policy has been presented concerning international rules (UNESCO, Council of Europe, European Union).
Today, Poles consider Polish cultural heritage to be a value they appreciate. Cultural heritage is mainly related to the issue of national identity, and as such, it is essential to a majority of respondents (90%). They consider historical buildings and places to be significant (91%). The majority of Polish society (83%) has a positive attitude towards historic buildings, including an emotional attitude towards them, although a large part (17%) also has an indifferent or negative attitude. 14% have a very positive attitude, and 7% have a very negative attitude. Poles support the Polish state's policy of protection and care of immobile monuments. They see the need for institutions dealing with heritage (84.7%), the authority of Voivodeship Conservators of Monuments (72.5%), the need to spend public money on the conservation and restoration of historic buildings (84%), and activities to develop and popularize knowledge about monuments (89%).

Secondly, the study shows that the immobile monuments policy in Poland is built on the principle of subsidiarity based on the monument protection and care system created by entities from the public, civil and private sectors. Actions under this policy are carried out by entities at various levels of public administration (government and local government) and by entities outside the government apparatus (churches and religious associations, private owners - natural and legal persons, non-governmental organizations). The protection of monuments creates a complex system of positions and rules (also presented graphically in the body of the work). The care of monuments has been entrusted to entities directly related to the monuments, i.e. their owners, both public and private. The State Treasury is the owner of the most important objects for the Polish national heritage. The popularization of knowledge about monuments as part of the care of monuments is carried out by both public and private entities.

Most of the owners of immobile monuments in Poland carry out their tasks in the field of monument care (in terms of technical and authenticity of substance and form) to a similar degree, i.e. between a satisfactory and good assessment. The Roman Catholic Church achieved the best results. The weakest outcomes were carried out by individuals (natural persons). The lowest average state of monuments was found in the mixed-ownership group. However, the stocks of all ownership groups include monuments in poor technical condition. 6-7% of the entire registry resource (4 - 4.4 thousand objects) is particularly endangered and requiring complex and urgent works. However, only 28% of the stock of registered immobile monuments does not require renovation interventions at present; the remaining ones need smaller or more extensive works. Industrial, economic, residential and defence facilities are in the worst conditions. The state of stock of immobile monuments in the Masovian Voivodeship
is the highest in the whole country. In this voivodeship, the Roman Catholic Church is an entity that has achieved a good state of its historical resource. The State Treasury and local government units are getting closer to this goal, and private owners – natural persons – are farthest from it.

Targeted subsidies are the primary subsidiarity mechanism in the policy of immobile monuments in Poland. There are also mechanisms of taking over and remitting of tasks between entities from different levels of the hierarchy of power of the cultural heritage policy system. As regards the care of an immobile monument, there are five takeover mechanisms, i.e. sale, exchange, donation, lease or expropriation for the benefit of the State Treasury or the commune. There are also five remitting mechanisms, namely sale, exchange, donation, lease and permanent management. In the area of monument protection, part of the tasks of the Voivodeship Conservator of Monuments may be delegated by the voivodeship governor (voivod) to a local government unit.

An essential finding of the work is to identify the construction of the policy of immobile monuments in Poland not only as based on subsidiarity but also as based on superposition principle, which is an author’s proposal. For the primary goal of this policy, that is, passing on the historic resource in good condition to the next generation, to be achieved, every subject of the policy with assigned tasks must implement them efficiently and effectively. The result of the entire system depends on the overlapping waves of actions of all actors. The principle of subsidiarity, on the other hand, eliminates the shortcomings of the policy based on the principle of superposition, because, firstly, it enables cooperation between entities creating waves of changes, and, secondly, it activates mechanisms of support and replacement to fill in possible inefficiencies, gaps, shortcomings, weaknesses, neglect and omissions occurring at lower levels by entities located above in the hierarchy of state power.

Extensive analysis carried out in the course of the work allowed for the formulation of several recommendations regarding policy objectives, legal changes, and the design and implementation of specific policy tools and activities. Coordination, planning, programming and financial management, partnership, cooperation, a sense of shared responsibility, a transparent system of requirements and rules, control, monitoring, evaluation, understanding the system and the position roles, as well as rejection of competition, are crucial to the system of immobile monuments policy. The key to success is the protection followed by the provision of care.