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# *The Institutional Protection of Industrial Heritage in the Strategic Perspective in Poland on the Example of the Górny Śląsk Region*

Instytucjonalna ochrona dziedzictwa przemysłowego w perspektywie strategicznej w Polsce na przykładzie regionu górnośląskiego

**Keywords:** strategy; identification of stakeholders' expectations; industrial heritage

**Słowa kluczowe:** strategia; identyfikacja oczekiwań interesariuszy; dziedzictwo przemysłowe

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## Introduction

The industrial heritage is an important part of local, regional and national culture and history. The proper care of its condition and its popularisation can contribute to enhancing the tourist attractiveness of a given area and can indirectly positively affect the development of investment and economic opportunities [Dallen 2016, p. 197]. In Poland, the industrial heritage protection is not institutionalised, which impedes the coordination of actions in this area and forces local government units to take individual and independent actions to preserve and promote the existing and historical local and regional industrial heritage. The proper organisation of this protection requires knowledge and experience from a variety of scientific disciplines such as history, cultural studies, sociology, tourism, geography, archaeology, etc. Therefore, the effective management of a heritage protection institution requires an

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appropriate management approach and interdisciplinary skills [Kossoff et al. 2016, pp. 190–199; Blagojević and Tufegdžić 2016, pp. 148–153].

Bearing in mind the above circumstances, the purpose of the article is to define the concept and basic strategic assumptions for the International Documentation and Research Centre on Industrial Heritage for Tourism. It was founded in 2008 as part of an agreement between the Zabrze gmina (*commune*), the Śląskie Voivodeship, the Upper Silesian Private College of Economics and the World Tourism Organisation. According to the agreement the scope of the Centre's activity was to cover the tasks within four areas: (1) collection, development and archiving of documentation related to the industrial heritage in the region and the country and, over time, related to international sites, (2) conducting research in the field of industrial heritage, (3) promotion of regional and national industrial heritage at international level, and (4) education in the field of industrial heritage at the professional and scientific level for the general public. However, the Centre's activity to date has not produced the desired results, therefore, a need has arisen to diagnose the causes of the Centre's low effectiveness and to develop a plan for this facility's activation. It was initially assessed that one of the key barriers to the Centre's development was the lack of a focused strategy and the adapted operational plan [Brol and Sztando 2009, pp. 70–71; Potoczek 2001]. Therefore, the main objective of the article is to define the concept and fundamental strategic assumptions for the International Documentation and Research Centre on Industrial Heritage for Tourism.

## 1. Methodology of research

One of the key stages in preparing the strategy is to know and take into account the opinions of external and internal stakeholders. This allows to specify the desired directions of action of the organisation by people involved in its activity and formation. This task is important, since external stakeholders have some specific expectations as to the principles of operation and results of a given entity. On the other hand, internal stakeholders usually have detailed knowledge and experience in the area of the organisation's activity, which is worth utilising at the stage of identifying strategic and operational actions. In addition, involving stakeholders in the strategy development process strengthens ties with the organisation and increases the involvement of all partners in the performance of strategic tasks [Berliński and Penc-Pietrzak 2004].

In the case of the International Documentation and Research Centre on Industrial Heritage for Tourism the stakeholders' opinion interviews were conducted based on an extensive categorised interview. This interview consisted of two parts: diagnostic and forecasting. The diagnostic part (25 questions) included the analysis of the assumed and achieved results of the Centre's activity, assessed the cooperation with the signatories to the agreement and other Centre's stakeholders and identified its key development barriers. In the forecasting part concerning the strategic directions of

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the Centre's development, 34 questions were asked on such issues as priorities and tasks to be implemented, the necessary investment outlays and the need to appoint the Programme Board.

The interviews were conducted with the Centre's employees (4 people), the representative of the Scientific Board (1 person) and the representatives of the Zabrze City Office as initiators and financing parties of the Centre's activity (3 people). The aim of such a selection of respondents was to identify the expectations of both internal stakeholders connected with the Centre's operational activity as well as external stakeholders shaping the strategic directions of this facility's activity. The following three sections show the results of interviews broken down by expectations concerning the proposed scope of activity together with the product portfolio, the desirable priorities and the results of activity as well as cooperation with external and internal stakeholders.

## 2. Independence, scope of activity and product portfolio

One of the key issues concerning further functioning of the Centre is its independence and organisational structure (the detailed questions are included in the Appendix). The stakeholders' responses in this regard are consistent. All of them assume that in the future the Centre can and should become an independent research unit. Some of them add that for this purpose they will have to be provided with sufficient human and financial resources [Ahmad and Jones 2013, pp. 445–457]. The respondents also point out that the process of achieving independence should be spread over time, and the Centre should start its activity as a separated organisational unit operating within the structures of the Coal Mining Museum in Zabrze. The respondents also confirmed the Centre's ability to independently plan and implement its budget and to seek external funding. However, some of them emphasised that this requires competent employees working on a full-time basis.

The respondents also agreed as to the potential scope of activity of the Centre. All the respondents assumed that the Centre should ultimately have an international scope. Nevertheless, it needs time to gather the right potential to reach such scope, therefore, it should be limited to regional level at the start of its activity. Then, it should acquire knowledge, experience and competences at national level. Such a systematic approach will enable an efficient and effective international expansion.

The authors of this paper share the respondents' view on the evolutionary approach to reaching an organisational independence by the Centre and the international level of its activity. Therefore, the Centre should now become an organisationally and decisively separated unit of the Coal Mining Museum in Zabrze. However, due to the thematic distinctiveness of the conducted activity, this unit should also have its own strategy, operational plan and budget, which will enable to effectively carry out its tasks and assess the results of its activity.

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### 3. Priorities and results of action

The founders, former employees and other stakeholders of the Centre were also asked to express their views on the priority areas of the Centre's activity. The conclusions of this part of interviews are presented below. They refer to the brand and product portfolio, the results in particular types of activity as well as the continuation or abandonment of the existing actions of the Centre resulting from the concluded agreement on establishing this unit. In addition, the summary also refers to the respondents' views on the sources of financing the Centre. A list of questions answering these issues is presented in the Appendix and it includes the following areas:

- BRAND AND PRODUCT PORTFOLIO
- RESULTS OF PROMOTIONAL, EDUCATIONAL AND RESEARCH ACTIVITY
- CONTINUED/DISCONTINUED ACTIVITY
- SOURCES OF FINANCING

All the respondents agreed that the Centre should create its brand, but a detailed analysis of the responses shows that they lacked a common idea for the brand development and the product portfolio to be provided. As regards the brand, the most frequently occurring responses concern the promotion of the Centre's activity at national and international level. However, considering that there is no firm product, or even the concept of what it should be, it is difficult to determine what exactly should be promoted.

The answers to questions on the results of research, educational and promotional activity are somewhat more accurate. As part of research activity, the respondents highlighted the publications and scientific conferences of regional, national and international significance as the result of activity. The educational activity includes courses, training, postgraduate studies and secondary education. Responses to the question on promotional actions show the lack of idea for this area of activity, as they are general and concern "promoting the industrial heritage" without specifying the ways of promotion and directions for cooperation in this regard. It was also suggested to give up promotional activity at all, since the existing sites operate independently in this respect. Nevertheless, it should be emphasised that the name of the Centre explicitly refers to actions for tourism, and such actions are difficult to imagine without the popularisation and promotion of tourism sites.

In turn, by pointing out the tasks to be continued, the respondents believe that all the actions mentioned in the interview and included in the agreement should continue to be implemented. The exception in this respect is a one-time denying of "Establishing and updating the methodologies and systems of documentation based on international experiences involving the role and effective use of the industrial heritage in the tourism development" due to the existing standards developed by recognised scientific circles. Among other tasks to be performed, the respondents point out the establishment of cooperation and meetings with local and regional

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representatives in Poland in order to jointly promote the industrial heritage as well as undertaking such actions abroad [Claver and Sebastián 2013, pp. 506–513].

Alternative sources of financing include research grants, income from own work and funds obtained from sponsors (operating industrial plants involved in promoting the existing industrial heritage). Therefore, the respondents see the possibility of obtaining external sources of income [Cho and Shin 2014, pp. 69–76].

To sum up this interview area, it should be stated that the respondents see the necessity and need to continue the Centre's activity, but they do not have a clear vision of this facility's further activity. It is also difficult for them to determine the results of tasks in individual areas. They mainly opted for maintaining the existing *status quo*.

## 4. Internal and external stakeholders

The interview also included questions on potential partners in the Centre's activity in relation to foreign partnership, including cooperation with the UNWTO and internal stakeholders related to advisory and expert activity as well as monitoring of the Centre's actions (the Programme Board and the Scientific Board). The questions concerning the analysed area are presented in the Appendix. In principle, these questions should allow to indicate the direction of further cooperation and the principle of substantive support and monitoring of the Centre's activity.

In view of the respondents' answers, the Centre should establish cooperation with Germany, France, the United Kingdom, the Czech Republic and Italy. In these countries the industrial tourism exists and is developing, thus, it is possible to take advantage of their experience. As regards the institutional aspect, they should include museums, institutions promoting industrial trails and sites, local government units and the equivalent of the Polish Chamber of Tourism. The scope of cooperation should focus on mutual promotion, exchange of experience and cooperation in carrying out research work. All the respondents agree that the Centre should cooperate with the UNWTO and become an affiliated member of this organisation. Nevertheless, this cooperation is defined mainly in the context of supporting the Centre's activity by the UNWTO in the promotional and financial area. There is no indication of the provision of services on the part of the Centre to the UNWTO. Such responses suggest significant one-sided expectations towards this organisation.

As regards internal stakeholders, most respondents do not see the need to separately appoint a substantive body monitoring the Centre's activity. They assume that the existence of the Scientific Board is sufficient. In their opinion, a body in the form of an additional Programme Board is not needed. According to the respondents, the main task of the Scientific Board should be to determine the directions of development of the Centre's substantive activity. The Board should therefore be primarily of strategic and advisory nature. It can also monitor the scope of performance of the Centre's tasks and then, in the respondents' opinion, this task is provided for the

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Centre's founders. Due to the potential nature of the Scientific Board, its representatives should have experience and competence in the field of industrial heritage and tourism – therefore, they should be recognised national and international authorities and public sector representatives. The Scientific Board should, in the respondents' opinion, be responsible for the conducted actions to the Centre's founders and financing parties. Reporting should be a key form of control (periodic monitoring and control reports). The Scientific Board should be comprised of the signatories to the agreement and representatives of scientific circles dealing with the industrial heritage.

Summarising the expectations of stakeholders in the studied area, it must be stated that they adequately and competently define the directions and the level of cooperation, but they have rather excessive and one-sided expectations towards potential partners. They also assume that the Scientific Board is a sufficient body to supervise the Centre's actions, which, from the point of view of spending public funds by the Centre, is not entirely correct.

## 5. Strategy concept and strategic assumptions

The starting point for preparing each activity strategy is to formulate a mission, a vision and a main strategic objective that will allow to answer the question of where the organisation is heading and how it intends to function in the future [Grudzewski and Hejduk 2004; Kaplan and Norton 2001; Sztando 2008, pp. 193–194; Ziółkowski 2005, pp. 102–105]. These elements are determined on the basis of values professed by the organisation's employees and exposed in the environment. Taking into consideration the specificity of activity of the International Documentation and Research Centre on Industrial Heritage for Tourism, which is reflected in the conduct of interdisciplinary activity on the border of museum science, history, sociology and tourism, the main values that this organisation should be guided by are as follows:

**VALUES**

- respect for tradition and cultural heritage;
- reliability;
- professionalism;
- objectivity.

On the basis of such values a vision was formulated, which should, in principle, answer the question: How should the organisation function in the future and what unique features should it represent? Below is a development vision for the International Documentation and Research Centre on Industrial Heritage for Tourism.

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**VISION**

The International Documentation and Research Centre on Industrial Heritage for Tourism is a leading expert research institute specialising in documenting, researching and promoting regional, national and international industrial heritage of tangible and intangible nature.

On the other hand, the mission includes key tasks and needs satisfied by the organisation in the strategic perspective. In the case of the International Documentation and Research Centre on Industrial Heritage for Tourism the mission was as follows:

**MISSION**

The mission of the International Documentation and Research Centre on Industrial Heritage is to support the development and promote the industrial tourism at regional, national and international level by documenting, researching and popularising the intangible and tangible industrial heritage.

The main strategic objective stemming from this mission is as follows:

**MAJOR STRATEGIC OBJECTIVE**

Developing and promoting the industrial tourism offer in the form of the Polish Industrial Heritage Trail by identifying, cataloguing, conducting research work, educating and promoting regional and national industrial monuments.

The idea behind establishing the Centre assumed that it would become a facility providing comprehensive services for the industrial heritage at regional and national level and promoting this heritage at national and international level using global examples and good practices in this regard, currently represented by the UNWTO and the ERIH. The realisation of this idea requires work at the foundation in four key areas.

Firstly, the tangible and intangible industrial heritage sites must be identified and catalogued in accordance with professionally prepared criteria of universal nature, allowing for the creation of an up-to-date list of regional and national industrial heritage and allowing for its systematic updating in the future.

Secondly, the developed catalogue (and the tasks that will emerge during its development) should be the starting point for initiating and co-developing research work in the areas of interest of the Centre and its external stakeholders, i.e. higher education institutions or research institutes.

Thirdly, the collected documentation and the results of research work should be disseminated using traditional and electronic data carriers for the purposes of popularisation and education in postgraduate studies, courses or training as well as preparing promotional bachelor's, master's and doctoral dissertations. The results of the latter can successfully supply the Centre's documentation and scientific

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resources, thereby initiating feedback between individual areas of activity of this institute.

Fourth, the documentary, scientific, research and educational activity should provide a source of knowledge and data on regional and national industrial heritage used for the purposes of promoting this heritage at home and abroad. The above-mentioned areas of the Centre's activity, correlated with its current name and idea guiding its founders constitute, in the strategy model, 4 key substantive pillars of activity.

To ensure the effective accomplishment of the Centre's objectives and undertakings, these pillars must be complemented by the fifth pillar connected with ensuring proper operational and strategic management. This pillar guarantees proper planning, organisation and control of short- and long-term actions carried out. The absence of this pillar in the previous years of the Centre's activity, including the lack of a clear strategic plan and subsequent operational plans, resulted in the lack of effective and efficient actions to achieve the objectives included in the agreement of 4 September 2008.

## Conclusions

The International Documentation and Research Centre on Industrial Heritage for Tourism is a unit of pioneering nature at regional and national level. The main idea behind establishing the Centre was the need to archive, protect and popularise the regional industrial heritage for present and future generations. This is undoubtedly a valuable and ambitious idea that must be pursued not only at regional, but also national and international levels. The location of the Centre in the Śląsk agglomeration, famous for its high level of industrialisation, is perfect for propagating and cultivating this idea.

Nevertheless, the assessment of the existing activity of the International Documentation and Research Centre on Industrial Heritage for Tourism has shown that the Centre requires revitalisation and activation as regards the tasks performed. The lack of clearly formulated strategy as well as strategic and operational tasks prevented proper orientation of the Centre's activity, and thus, a fully effective and efficient operation.

With this in mind, 2 key areas were identified in the Centre's activity: (1) archiving and research, and (2) educational and promotional, provided that the accumulated resources and knowledge as regards the industrial heritage are popularised through the Centre's educational and promotional activity. The archiving and research actions include, mainly, collecting and analysing materials on the regional and national tangible and intangible industrial heritage. This will be the starting point for systematising and cataloguing, according to the uniform criteria, sites and intangible products of the industrial heritage in the form of a virtual Polish Catalogue of Industrial Heritage and, ultimately, the Polish Industrial Heritage Trail that can be found on the Centre's website.

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**Appendix – the interview questions**

The stakeholders' expectations in this regard were identified on the basis of responses to the following interview questions:

Can the Centre become an independent research institute in the future?

Is the Centre able to plan and implement its own budget, including taking effective actions to obtain funds under research projects?

What geographical scope should the Centre's target core activity have?

Are actions at regional, national or international level a priority?

BRAND AND PRODUCT PORTFOLIO

In your opinion, should the Centre develop its brand? If so, in what way?

How do you imagine the Centre's product portfolio, especially supported/promoted by individual signatories to the agreement? What should be included and excluded? Where is the potential?

RESULTS OF PROMOTIONAL, EDUCATIONAL AND RESEARCH ACTIVITY

What promotional results should the Centre achieve? What can it do to be noticeable?

What research results should the Centre achieve?

What educational results should the Centre achieve?

CONTINUED/DISCONTINUED ACTIVITY

Bearing in mind that the current main areas of the Centre's activity relate to the heritage promotion, research activity, training and education as well as archiving activity, which of these areas should be leading? Should they be balanced?

Which of the following tasks are worth pursuing in the future?:

- Establishing and updating the methodologies and systems of documentation, based on international experiences involving the role and effective use of the industrial heritage in the development of tourism.
- Acquiring, registering and analysing research work, case studies, designs, techniques and other information resources and records in this regard in accordance with the established methodologies and systems.
- Carrying out and publishing own research in this field.
- Acquiring and registering information on existing and potential opportunities for obtaining funds and financing the undertakings aimed at exploiting the heritage for the development of tourism.
- Disseminating information from the obtained information resources, in particular through the website on the Internet [Hain et al. 2016, pp. 2030–2035].
- Offering and providing assistance in planning and developing the tourist product based on the industrial heritage.
- Close cooperation with the Marshal Office of the Śląskie Voivodeship and the Śląsk Tourist Organisation in undertaking actions for the development and promotion of the regional tourist product – the Technological Monuments

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Trail – including active participation in works implementing the strategy of commercialisation and promotion of the TMT.
- Offering and providing assistance in research, education, training and other technical services in this respect.
- Impacting on the participants in the development of tourism, such as the disposers of sites subject to the industrial heritage, travel organisers, potential investors, professional and academic circles, aimed at promoting the industrial heritage as part of resources and assets for the development of tourism.
- Facilitating the communication and exchange of experience in this field.
- Organising international conferences and other mass events related to the industrial heritage in tourism activity.
- Other actions? (please specify)

SOURCES OF FINANCING

Do you see any alternative sources of financing? If so, what?

INTERNAL AND EXTERNAL STAKEHOLDERS

In which of the foreign institutes do you see the potential for cooperation? (please specify) To what extent? What can the Centre offer to foreign stakeholders?

To what extent should the Centre cooperate with the UNWTO? Which UNWTO criteria should be used to create a list of industrial heritage for tourism?

Should the Centre be an affiliated member of the UNWTO?

The following questions were asked as regards the Programme Board of the 'Guido' Historic Coal Mine and the Centre's Programme Board:

Are the above bodies needed?

What scope of tasks do you see for the above bodies?

What competencies should the above bodies have?

Before whom should they be responsible to for the actions carried out?

What supervisory/control bodies/tools should they be equipped with?

Who should be members of the PB and the SB?

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## The Institutional Protection of Industrial Heritage in the Strategic Perspective in Poland on the Example of the Górny Śląsk Region

The main objective of the article is to define the concept and fundamental strategic assumptions for the International Documentation and Research Centre on Industrial Heritage for Tourism. To accomplish this objective, the paper presents the results of in-depth interviews conducted among internal and external stakeholders of the International Documentation and Research Centre on Industrial Heritage for Tourism concerning the expectations for future directions of the Centre's development and the effects of its activity. Then, based on the conducted consultations and the diagnosis of the Centre's activity to date, the fundamental assumptions of the Centre's strategy were specified and the key areas of activity were identified. They included: (1) archiving and research actions, and (2) educational and promotional actions.

## Instytucjonalna ochrona dziedzictwa przemysłowego w perspektywie strategicznej w Polsce na przykładzie regionu górnośląskiego

Celem głównym artykułu jest określenie koncepcji i podstawowych założeń strategicznych dla Międzynarodowego Centrum Dokumentacji i Badań nad Dziedzictwem Przemysłowym dla Turystyki. By tak przedstawiony cel zrealizować, przedstawiono wyniki pogłębionych wywiadów przeprowadzonych wśród interesariuszy wewnętrznych i zewnętrznych Międzynarodowego Centrum Dokumentacji i Badań nad Dziedzictwem Przemysłowym dla Turystyki dotyczące oczekiwań w zakresie przyszłych kierunków rozwoju Centrum oraz efektów jego działalności. Następnie, na podstawie przeprowadzonych konsultacji oraz diagnozy dotychczasowego działania Centrum, określono podstawowe założenia jego strategii oraz wytyczono główne obszary działalności obejmujące działania: (1) archiwizacyjno-badawcze oraz (2) edukacyjno-promocyjne.