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## MONUMENTS OF HISTORY – A FORM OF PROTECTION, A FORM OF PROMOTION, A FORM OF MANAGEMENT?

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**ABSTRACT:** The Monuments of History is a collection of over 100 most valuable monuments in Poland. At the same time, the Monuments of History are one of the 5 forms of protection of monuments, specified in Polish legislation. These circumstances make it necessary to assess the functioning of this form of the monuments protection.

Many elements in the concept of the Monuments of History, the procedure of their nomination and the substantive assessment are taken over from the UNESCO World Heritage System. Therefore, this system may be a point of reference for the evaluation of the functioning of the Monuments of History. At the same time, on the basis of this comparison, it is possible to indicate directions for improving the functioning of the Monuments of History.

The paper discusses fundamental aspects of the functioning of the Monuments of History – including the place and role of the Monuments of History in the Polish system of the monuments protection, the procedure of nomination, the procedure of evaluation, the relationship of the Monuments of History with the assets of the UNESCO World Heritage.

**KEY WORDS:** Monument of History, management and protection of heritage

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2019 marks the 25th anniversary of the recognition of the first group of monuments as the Monuments of History<sup>1</sup>. During this period, more than 100 of the most valuable objects and ensembles have obtained this unique status. Therefore, the experience was taken away, which may form the basis for the assessment of the functioning of this form of the monuments protection. This assessment should focus on the following question: is the Monument of History a real form of the monument protection – as indicated by the formal statutory provision, how the Monuments of History function in practice, and does it matter in the scale of the whole resource and the system of monuments protection?

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<sup>1</sup> The first 15 Monuments of History were established by virtue of the Order of the President of the Republic of Poland Lech Walesa of 8 September 1994. (Monitor Polski of 16 September 1994, items 412-426, pp.638-667).

The answer to these questions should be started from paying attention to the unique position of this group of monuments, which determines its size and significance. The assumption is that the Monuments of History are the most valuable objects in the Polish resource of monuments, which status is created by several elements. First of all, recognition as a Monument of History is made by virtue of a decree of the President of the Republic of Poland. The Monuments of History – as a separate group of monuments – have been indicated in the Act on the protection and care of monuments as one of the forms of protection distinguished in the Polish legislation. The system of evaluation and qualification of historical buildings, which candidate for recognition as a Monument of History is directly based on the requirements formulated for the UNESCO World Heritage. This in turn justifies the statutory provision that new candidates proposed by Poland for the World Heritage List should be selected from among the Monuments of History<sup>2</sup>.

The above conditions make the group of Monuments of History small and probably will remain so in the future. However, the proportion of 100 objects in relation to the resource of tens of thousands of monuments cannot be misinterpreted. The situation of the group of the Monuments of History (understood in a broad sense) is of crucial importance for the perception, protection and use of the entire stock of monuments in Poland. This statement can be justified in 3 aspects – or levels, taking into account their scale.

The first aspect is the widest, since it concerns the scale of the entire material heritage of Polish culture. A thesis can be put forward that the situation and condition of the Monuments of History have an impact on the shaping of the image of the entire Polish heritage, i.e., the achievements of Polish culture (and the cultures existing in the present-day lands of our country). If in the majesty of law and procedures a group of the most valuable objects was indicated, they were given a noble name "Monuments of History" and a distinctive logo was developed, the highest office of the state has been involved – the President of the Republic of Poland, whose regulations grant the status of the Monument of History, it was written that among them will be nominated candidates for the World Heritage List, so their state of preservation should be exemplary. The value and significance of these monuments should be reflected in the most careful protection and care.

Recognition of the monument as the Monument of History, due to the accompanying conditions, has therefore a significant symbolic dimension<sup>3</sup>. Prior to this act, the monument was only one of the 70 thousand elements forming the heritage protected in Poland on the basis of an entry in the register of monuments. In such a large collection, the protection of these elements could have been the result of many local factors. Weaknesses of protection, negligence or too big

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<sup>2</sup> The amendment of the Act on the Protection of Cultural Property of 1962, which was made in 1990, included in the 6-th article, 2-nd point, that: *The Monuments of History are presented to the World Heritage Committee for inclusion on the World Heritage List and protection under the Convention on the Protection of the Cultural and Natural Heritage, adopted in Paris on 16 November 1972.* (Journal of Laws of 1976, No. 32, items 190 and 192).

<sup>3</sup> Acts of recognition of a monument as the Monument of History have a ceremonial character. Nominating acts are handed out during ceremonies organized by the Office of the President of the Republic of Poland and handed over personally by the President. In some cases, ceremonies were held directly at the Monuments of History and were given a noble character, commemorating this fact with memorial board (e.g., in Gdynia).

transformations were somehow hidden in such a large collection of monuments.

The change of the status of the monument to the Monument of History creates a new situation. After this change, the object is one of only 100 the most important and valuable objects for the whole national resource. Therefore, possible deficiencies in its protection can be seen as a compromise of the state, which is unable to take care of its cultural heritage, which it considered to be the most valuable. That is why granting the status of the Monument of History should be treated first of all as a great obligation, which should be fulfilled by all the partners co-responsible for this good. The realization of this task is of course dependent on the unambiguous determination of the requirements and rights, which in the system of monuments protection will be assigned to the Monuments of History.

The second aspect is the level of the monuments protection system. The state of the Monuments of History is a kind of a showcase of the entire system of monuments protection, proving its credibility, resulting from its efficiency. If a new category is introduced to any system – here to the system of protection of monuments – then it must be filled with content. It has to be done, because the basis for the functioning of any system is trust in its logic and efficiency. Users and observers of the system must be convinced that it is complete and working. This is a condition of its respect and compliance with its rules.

This aspect should be particularly emphasized in the case of the system of monuments protection, because it is based on a social contract assuming that monuments have certain values that justify their special treatment. In this case, it means, first of all, the obligation of the owner of the monument to ensure its protection in accordance with the conservation standards, which is accompanied by a limitation of his basic right to dispose of his property.

It should be remembered that the values of monuments – which are the subject of this agreement – are not obvious. That is why it is so important to trust the logic, sensibility and effectiveness of the monuments protection system. It is more important than the rigors and benefits that this system has at its disposal. That is why the efficiency of the system of monuments protection assessed from the point of view of the state of protection of the Monuments of History should be exemplary. This aspect seems to be particularly important – the protection of the Monuments of History should be a training example used in the whole system of monuments protection<sup>4</sup>. Therefore, a coherent and complete accompanying system for the category of the Monuments of History should include: the procedure for selecting the Monuments of History (this condition is met), the criteria for their evaluation, the requirements for protection and the scope of support.

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<sup>4</sup> An important element ensuring an adequate standard of protection for the Monuments of History should be the introduction of the obligation to draw up the Management Plans. Such an obligation should be transferred from the UNESCO World Heritage System, in line with the logic of transferring the system for the qualification of candidates for the Monuments of History. Monuments managers may use several forms of Management Plans developed for the benefit of the World Heritage in Poland – e.g., *The Historical Center of Warsaw. A Site Inscribed onto The World Heritage List. Management Plan*, Warsaw 2012; Szmygin B., Fortuna-Marek A., Siwek A., *Value assessment and Management Plan for the Paper Mill in Duszniki-Zdrój*, Lublin University of Technology, Lublin 2017.

The third level is the narrowest as it concerns only a small group of the Monuments of History. The problem is the conditions in which the managers of these objects operate. They must be provided with systemic support. Being responsible for a unique part of the heritage, they also need to know what is expected of them and how to support them. The scale of managers' responsibility must be supported by the instruments they may have at their disposal.

In this context, it is worth recalling the latest action, as it was an extension of the list of the Monuments of History on the occasion of the 100th anniversary of Poland's regaining independence<sup>5</sup>. The publicity that accompanied the whole of campaign and the new nominations aroused the hopes of the administrators and communities associated with the Monuments of History. Waiting for further action and support in these environments is commonplace. The managers of these places and their communities will demand that these expectations be met.

In this aspect, the relationship between the Monuments of History and World Heritage of UNESCO is also important. Managers and communities who identify themselves with the individual Monuments of History are well aware that the provisions of the Polish law require that candidates for the World Heritage List be selected from among the Monuments of History. That is why some of the managers treat obtaining the status of the Monument of History as a necessary stage in the candidacy for the UNESCO List. These plans and hopes – no matter how justified they may be – will have to be answered. In practice, this means that it is necessary to formulate clear rules and policies for the introduction of new proposals to the Tentative List. A significant increase in the number of Monuments of History in recent years will increase the pressure to expand the Polish Tentative List<sup>6</sup>. For reasons of substance, it is not appropriate for the managers of individual Monuments of History to take the initiative in this respect.

The current increase in the number of the Monuments of History makes it possible to formulate a postulate concerning the policy of the Polish state on the issue of the UNESCO World Heritage List. The Polish Tentative List should be determined taking into account the national resource of monuments (i.e., the list of Monuments of History), the requirements of the World Heritage System (a permanent element formulated in the *Operational Guidelines*<sup>7</sup>) and current

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<sup>5</sup> Compare e.g., *100 Monuments of History*, National Heritage Institute, Warsaw 2018. In 2019 the number of the Monuments of History rose to 105.

<sup>6</sup> The Polish Tentative List submitted to the World Heritage Centre currently consists of 6 items. These are the following notifications: *Beech forests of primary character in the Bieszczady National Park*, *Gdańsk – the city of freedom and memory*, *Augustów Canal*, *Modernist Downtown of Gdynia – an example of creating a cohesive community*, *Pieniny valley of the Dunajec River*, *Papier-mill in Duszniki-Zdrój* (the latest application submitted on 19 October 2019).

<sup>7</sup> *The Operational Guidelines for the Implementation of the World Heritage Convention* are updated detailed information that comprehensively present the way of dealing with the UNESCO World Heritage assets. Polish version – <https://swiatowiedziedzictwo.nid.pl/media/uploads/dokumenty/wytyczne-operacyjne/wt-operacyjne-pol/wo2015-tekst-glowny-pl148421293082.pdf>.

preferences in the policy of the World Heritage Committee (a variable element<sup>8</sup>). At present, these are decisions resulting from individual ideas formulated centrally or locally, but they do not create a coherent, long-term policy.

All the above arguments lead to a clear conclusion that the Monuments of History – as a separate group of the most valuable monuments – are important for the whole system of monuments protection. Therefore, they should be comprehensively developed, effectively protected and properly managed within the framework of the system of monuments protection. The next question should therefore concern the current situation of the Monuments of History.

The assessment of the situation can be started from the formal procedure of qualification of monuments for the Monument of History. This is a key issue, as the proper selection procedure determines the quality of the collection of the Monuments of History.

The formal basis for the establishment of the Monuments of History are clearly defined in the most important aspects<sup>9</sup>. The subject of recognition must be the fixed monuments entered into the register of monuments or being a cultural park of special value for the region. Proposals may be submitted by the owners or administrators of monuments, directing them to the Ministry of Culture and National Heritage. The documentation presenting the nomination is checked in terms of its formal and substantive content. The National Heritage Institute prepares an opinion, which includes an assessment of the nomination and is the basis for drafting a ministerial regulation. The prepared opinion is presented to the Council for the Preservation of Monuments, which recommends (or does not recommend) that the monument should be recognized as the Monument of History. The recommendation is the basis for submitting an application to the President of the Republic of Poland, who finalizes the process by issuing a relevant regulation.

Recently, thanks to the intensive mobilization and work of the National Heritage Institute, the presented procedure has been working smoothly. This allowed to be realized the ambitious plan to establish 100 Monuments of History in the year of celebration of the centenary of Poland's regaining independence<sup>10</sup>.

The multi-stage process is sufficiently developed to allow for a proper evaluation of the proposals for the Monuments of History. However, the procedure of assessing their value and the standard of protection needs to be improved in terms of content. The requirements in this respect should

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<sup>8</sup> The inclusion of the current situation on the UNESCO list increases the chances of new nominations being entered. Currently, serial nominations representing the so-called under-represented groups of monuments (e.g. industrial, contemporary, vernacular) have a greater chance. Therefore, Poland should actively participate in the organization of serial entries representing such heritage groups. Currently, work is underway to prepare several serial nominations – paper-mills (Duszniki-Zdrój), oil mines (Bóbrka), 19th century ideal industrial cities (Żyrardów), fortifications (Przemyśl), socialist-realist complexes (Nowa Huta). These monuments are (or are trying to be) the Monuments of History.

<sup>9</sup> The criteria for selecting the Monuments of History were adopted by the Council for the Preservation of Monuments attached to the Minister of Culture and National Heritage at a meeting on October 6, 2005.

<sup>10</sup> Within the framework of the *"Independence" Multiannual Program for the years 2017-2022*, the National Heritage Institute implemented a project of the 100 Monuments of History for the 100th anniversary of regaining independence.

be analogous to those for the World Heritage assets, while of course maintaining appropriate proportions.

The foundation of the World Heritage is the definition of the values that must represent the assets listed on the UNESCO World Heritage List<sup>11</sup>. A similar problem must be solved in the case of the Monuments of History. By analogy with the World Heritage System, the Monuments of History can be those of supra-local value and recognized importance for the entire national cultural heritage. At the same time, monuments – on the scale of the whole collection – should reflect typological, stylistic, temporal, and regional diversity. The collection of Monuments of History should be representative of the entire national resource. The symbolic and emotional aspect is also important<sup>12</sup>.

The Monuments of History, just like the property included in the UNESCO list, should be an example of proper management and protection, in accordance with the standards of conservation protection<sup>13</sup>. Therefore, ensuring, among other things, proper technical condition, identification of threats, proper use and access – these should be the conditions to be checked already at the stage of recognition as a Monument of History.

It is therefore necessary to implement a modern standard of analysis and protection of assets already recognized as the Monuments of History and applying for this status. This standard should result from the contemporary approach to the heritage protection, i.e., in practice it should be a model developed and binding in the World Heritage system. This model covers three levels.

Level 1	Value of the monument	Evaluation criteria
Level 2	Quality of the monument	Authenticity and integrity
Level 3	Preservation and management of the monument	Technical condition, risks, management, monitoring, financing, etc.

<sup>11</sup> A good point of reference can be used in the World Heritage System the "OUV Statements" – documents which, in an established, synthetic form, represent the value which constitutes the basis for recognition as a UNESCO asset. All Polish assets of UNESCO have such statements developed. A similar type of document could be introduced for the Monuments of History.

<sup>12</sup> The assumption is that the criteria for the evaluation of Monuments of History generally refer to the criteria of the UNESCO List, additionally taking into account the aspect of "*historical, symbolic and emotional values related to the history of Poland*" – Konopka M., *Pomniki Historii – założenia i realizacje*, [in:] *Vademecum Konserwatora zabytków*, PKN ICOMOS Bulletin, Warsaw 1997-1999, pp.117-120.

<sup>13</sup> In practice, the managers of urban complexes recognized as the Monuments of History as an instrument of management use the creation of the Cultural Park (e.g., Cracow, Nowa Huta, Srebrna Góra, Kłodzko). However, the perception of this form of protection and management is limited to the control of advertising activities in the area, which is far from sufficient.

The basic essential feature of this model of monument evaluation is the already mentioned precise indication of its value. In the contemporary protection of monuments, the descriptive determination of the value does not have an operational value. The values must be analytically precise, because it is to be a direct indication for the guidelines – and more broadly, for the conservation policy<sup>14</sup>. This is what is used to determine the so-called attributes of value and this level of analysis must be achieved<sup>15</sup>. Analytical approach to the value of a monument, of course, requires the definition of evaluation criteria. Therefore, it should be clearly recalled that without defining the criteria, it is simply impossible to make an evaluation.

Of course, the evaluation of the value is already being done during the qualification of the monument for the Monument of History. However, the criteria for evaluating nominations for the Monument of History are not clear, in the light of previous practice. As a result, the evaluation of nominations does not seem to form a coherent whole – it is a set of separate actions.

What is very important, clear evaluation criteria are needed not only by conservators, but also by other stakeholders. The conservation community needs to know how to select new Monuments of History and how to protect them. On the other hand, managers and owners of more valuable monuments will know what monuments, and in what condition, can aspire to become a Monument of History. Nowadays, many confusions and misunderstandings are created by local initiatives forcing objects that should not aspire to be recognized as the Monument of History.

The definition of criteria is also an indispensable condition for the discussion about the limits of increasing the number of Monuments of History. And such a question is fully justified, e.g., to determine the plans of financial support for the Monuments of History, in view of the large number of new candidates<sup>16</sup>. Meanwhile, without evaluation criteria, the target number of the Monuments of History is arbitrary and discretionary.

However, it must be made clear that it is not easy to establish criteria for the nomination of the Monuments of History. It is a difficult task, and it is not possible to directly apply the six criteria used to assess the cultural heritage of the candidates for the UNESCO list. However, in the contemporary protection of monuments there will be no easy actions or decisions. Better are criteria not very precise than intuitive ones.

The development of criteria, the determination of values and its material attributes, is the basis for the evaluation of the authenticity and integrity of a monument. Only on this basis can be developed the guidelines for the protection and contemporary development of individual

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<sup>14</sup> For monuments of building and architecture it is possible to propose valuation systems based on their connection with material representation. – Fortuna-Marek A., Siwek A., Szmygin B., *Wartościowanie dziedzictwa w systemie SV - metoda i przykłady zastosowania*, Lublin 2017.

<sup>15</sup> The concept of value attributes for the World Heritage assets is presented in: Szmygin B., *Atrybuty wyjątkowej uniwersalnej wartości*, [in:] *Wyjątkowa uniwersalna wartość a monitoring dóbr światowego dziedzictwa*, Warsaw 2011, pp. 58-69.

<sup>16</sup> *The list of applications for recognition as the Monument of History* drawn up by the National Heritage Institute on October 4, 2019 includes 51 proposals of monuments and ensembles, 3 applications postponed by the decision of the Council for the Protection of Historical Monuments and 1 application concerning a place of a martyrological nature.

Monuments of History. Therefore, all these elements should be included in the documentation presented by the manager who is trying to recognize the monument as a Monument of History. On the other hand, the indication of value attributes is very important for the monitoring of a monument. Even in the most valuable monuments are necessary some technical interventions and activities related to their use and adaptation. Therefore, a methodology is needed that will allow to define safe limits of these interventions. Attributes serve this purpose. They can also be used as so-called indicators on which the monitoring of monuments should be based<sup>17</sup>.

The second important issue is to organize the activities of all stakeholders (currently less active and aware), who should participate in the process of protection of the Monuments of History. Effective protection of the Monuments of History requires the creation of a system obliging the cooperation of key stakeholder groups that have a real impact on the situation of the Monuments of History.

The activities at the Monuments of History are generally carried out by three groups of partners: managers, local authorities, and the Polish state. Each of these partners has specific opportunities and responsibilities. On this basis, it is necessary to define their roles and responsibilities in relation to the Monuments of History. This is important because these roles are not interchangeable or completely substitutable. The lack of appropriate action on the part of any partner weakens the system of care for the Monuments of History, and in some cases it may be simply ineffective.

The partners' cooperation must fill four areas that are necessary to build a functioning protection system – law, organization, maintenance, and financing. Law is the legal basis for the functioning of the Monuments of History – it is the area of activity of central and local authorities. Organization is primarily a form of management of the Monument of History – it is an area of activity of the administrator and to some extent of the state (the protection of the Monuments of History can be supported from the central level by a specialized advisory and control unit – similarly to the World Heritage). Conservation is an activity related to the physical maintenance and functional use of a monument – it is the area of the administrator and the state through conservation services. Financing is the securing of funds to maintain the monument in a proper condition – it is the area and responsibility of all partners, with significant participation of local governments and the state<sup>18</sup>.

To sum up, it can be stated that effective protection of the Monuments of History requires a

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<sup>17</sup> Monitoring should be an indispensable element of managing a monument. The monitoring has not been implemented in the Monuments of History, only in 2018 the proposal of monitoring this group of monuments in the Ministry of Culture and National Heritage was prepared and is to be implemented. It is justified to use methods of assessing the impact on monuments (the so-called heritage impact assessment), and monitoring developed in the World Heritage System – compare e.g., *Guidance on Heritage Impact Assessment for Cultural World Heritage Properties*, ICOMOS, Paris 2011; Wijesuriya G., Thompson J., Young Ch., *Managing Cultural World Heritage*, UNESCO/ICCROM/ICOMOS/IUCN, Paris 2013.

<sup>18</sup> In this context, it should be stated that after 30 years of subsidizing the renovation of Krakow's monuments with the amount of several dozen million zloty from the central budget, further spending of these funds only in this city is unjust and irrational. These funds should also support the protection of other World Heritage Sites or Monuments of History.

systemic solution to the 4 problems mentioned above, which requires the participation and cooperation of the 3 mentioned partners. Thus, within the framework of the Polish system of protection of historical monuments, a comprehensive program of protection of the Monuments of History should be formulated, which will include legal, organizational, conservation and financial elements, planned to be implemented as obligations of managers, local authorities and the state.

Therefore, answering the question posed at the beginning, it should be stated that the Monuments of History is a category of monuments that formally and materially exists, but as a form of protection still needs to be filled with a content<sup>19</sup>.



Fig. 1 The Museum of Papermaking in Duszniki-Zdrój is the leader of a consortium preparing an international serial entry for European paper-mills

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<sup>19</sup> In the article, the term "Monument of History" is written in capital letters to emphasize the unique rank of this group of monuments. The proposal to introduce such a spelling is discussed and generally supported by members of the Council of Monuments Protection. An additional argument supporting the adoption of such a spelling is the possibility of highlighting the unique group of "Monuments of History" in translation into English - the term "historic monument" (written in small letters) is already a customary translation of the specific Polish term "zabytek".

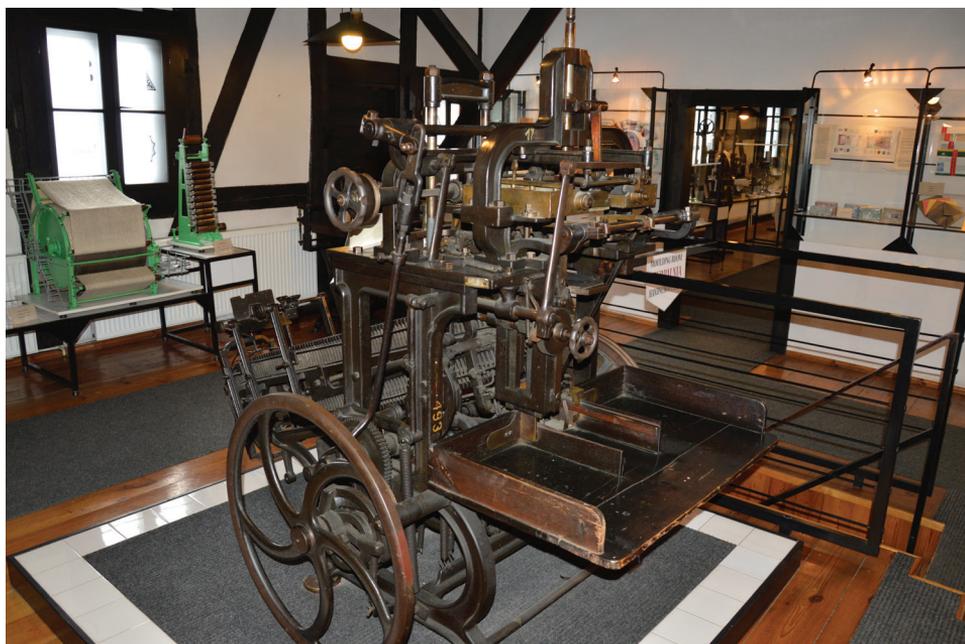


Fig. 2 The Museum of Papermaking in Duszniki-Zdrój still produces paper using traditional methods

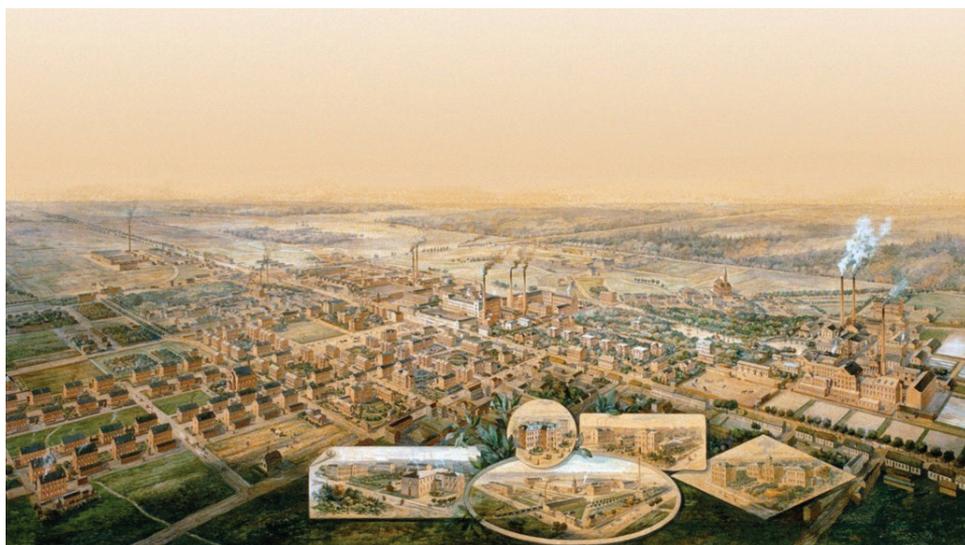


Fig. 3 The factory and residential complex in Żyrardów should be an element of the international serial entry of 19th century factory and residential complexes



Fig. 4 Exposition presenting the historical equipment and products of the linen factory in Żyrardów



Fig. 5 The Crude Oil Mine in Bóbrka should be part of the international series entry of the first industrial oil extraction and processing sites

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