

Social and Economic Integration of Cultural Heritage

Advanced Research Initiation Assisting and Developing Networks in Europe

Jaroslav Macháček

As in other parts of Europe, the preservation, care and study of historically valuable works of art, material works as well as documents has been perceived and practised in the Czech Lands (Bohemia and Moravia) as an attribute of general culture in various forms since the renaissance period.

Institutional protection and care of monuments in the Czech Republic found its formal inception with the establishment of the State Monument Office for Moravia and Silesia as well as the State Monument Office for Bohemia in 1918, just after the emergence of the free Czechoslovak State. The creation of the State Photometric Institute and the State Archaeological Institute in 1919 should be associated with the rise of institutional care of national historical heritage. As far as legal aspects are concerned, the first law explicitly dealing with the protection of monuments and cultural heritage was introduced in the late fifties (Act 22/1958).

In the periods after the World War II, the concern of institutions implementing monument care has been significantly extended by the protection and restoration of historical settlements, represented particularly by the cities where the first urban conservation areas had been created not later than in the year 1950. That was in the year 1953 when the institutions of monument care were charged with the administration of about 150 structures having been already nationalised. These structures were represented by castles, chateaux and monasteries, including their exceptionally valuable furnishings. The reinstallation of artistically valuable interiors and making them possible to the access of general public was in the forefront of the institutional efforts in that period. The content of the activities of monument care institutions was fully specified in 1958 by the Law No. 22 and much later adjusted to the new requirements and progress in the field of protection by the Law No. 20 approved in 1987.

Present legal regulation in the area of monument protection has been based on the Act on the State Heritage Preservation, introduced in 1987 and amended into its latest version by the Law No. 242/1992. In accordance with the legislation provisions, the components of cultural heritage are represented by "declared" cultural monuments - both movable and immovable - and their sets, including those items registered in the original State List in the course of period 1958 - 1987 and also protected areas (conservation areas and zones), possibly buffer zones and sites rich in archaeological finds. The cultural monuments of exceptional importance and value as well as their complexes are to be declared National Cultural Monuments. Some of these monuments have been successfully proposed to be included into the World Heritage List.

In the sense of both respective legislation and current practice, an entity is to be recognised a part of protected cultural heritage when it is marked by permanent cultural value and under the condition that the society has decided to keep it as a source of knowledge on the past and the contribution to the spiritual wealth of the presence. As common anywhere in Europe, beside works of arts and significant documents, variety of structures and historical parts of settlements, technical and handicraft works and other similar objects become part of the protected national cultural heritage. It should be noted, that cultural heritage in its broader concept includes also valuable parts of cultural landscape, possibly containing archaeological sites and particular historical structures.

Quite a number of specific attributes, principles and rules of cultural heritage protection has to be observed and implemented with regard both to conceptual projects and common practice. Let us mention some of those deemed most important.

Usually, immovable monuments and also large part of movable monuments have to be protected in their original location. Current functional use from the part of their owners is usual case. The outside environment has to be perceived, in some respects, as a potential source of the effects harmful to monuments. As is often the case, immovable monuments have been altered in the course of time. Nonetheless, they still possess significant remnants associated with the periods of their origin. The ownership rights to the monuments prove to be relatively changeable and flexible. The movable monuments keep to be subject to the risk to be stolen and removed outside the national territory.

Protected zones have to be regarded as living poly-functional organisms integrated with the preserved historical parts of settlements and landscapes. A great deal of specialised and artistic work, often based on the results of research, makes a condition of the appropriate restoration and conservation of movable and immovable documents. The cultural heritage stock is marked with a diversity that excludes the creation and application of a general system of rules, procedures and techniques of handling and preservations.

Heritage preservation as a permanent process is based on a system of special professional and administrative activities that make possible protection, restoration, study and adequate use and presentation of the components of the heritage, which have not been included into the collections of the state archives, libraries, museums and art galleries. The function of monuments care is above all to preserve and study the cultural heritage stock and concurrently to present the values embodied there to the general public. The principle of securing both theoretical and practical components of monument care through a system of institutions specialised in the area of cultural heritage has been accepted as a kind of European standard in this domain.

Czech system of heritage preservation is comparable with the systems of similar functions in the European Union member states. The collaboration of the state authorities with the professional institutions acting in the domain of historical heritage conditions the effective functioning of this system. The state authorities are in the position to decide on the rights and obligations on the part of individuals and organisations related to historical heritage and are responsible for supervision in these respects. The state institutes established for heritage preservation and associated functions carry out the research, analytic, methodological, documentary, consulting, educational and information activities. They are also responsible, however, for the management of several selected, most valuable components of cultural historical heritage owned by the state.

Among the functions of the state heritage preservation system, protection of the monuments is considered to be the basic one. In terms of conceptual work as well as practical implementation. Performing this function involves above all requests to issue obligatory conditions on the restoration of a cultural monument, requests for the state's financial contribution for maintaining and restoring a cultural monument, requests to cancel a declaration of a cultural monument, entry of ownership and other rights to an immovable property, stipulating the prices of immovable and movable properties, fulfilling the law on physical planning and building code in its parts concerning monument care. The crucial document and instrument for the systematic protection is the Central List of Cultural Monuments of the Czech Republic which is maintained by the State Institute for the Preservation of Cultural Heritage. Altogether, this List contains beside more than 38,7 thousands. of immovable monuments, more than 800 thousands. of items covering the fund of movable monuments.

When evaluating monument protection and maintenance in nineties, we can see both remarkable positive changes and also undesirable phenomena. Positive developments include massive replacing of until recently anonymous and nondescript responsibility accruing from state ownership by individual, clearly marked and defined responsibilities of particular monument owners. This has brought about significant decrease in the number of

not maintained and unattended monuments that would have come to decay. Considerable increase in the volume of maintenance and restoration of monuments has also marked the mentioned period, as well as the emergence of a new competitive economic environment bringing up large expansion of offers in the field of construction work associated with monuments care and also broadening of the range of products and materials serving preservation purposes. We cannot also omit creation of civic initiatives providing support to local authorities in the area of the protection of endangered monuments.

Focusing on negative phenomena, the following is deemed substantial: Recent years saw ever increasing pressure to demolish and replace historic buildings with new constructions or carry out inappropriate modernisation and reconstruction of these buildings. Significant rise in the value and prices of land in large cities has stimulated intentions to construct high structures incompatible with historical substance of particular sites. Some of historically and in terms of artistic value important monuments, even though limited in number, have been misused for purely speculative financial objectives, without any concern of proper maintenance and use of objects. Changes of surroundings of the monuments and their sets sometimes involve architectural additions that do not suit cultural attributes of the site, not to speak of the negative impact brought by commercial advertisements and adjustments.

Enormous increase in thefts and losses of movable monuments as well as in vandalism and deliberate destruction of protected entities, having been a result of the growth of crime and socially pathological behaviour, have posed a major challenge to the monument care system. The expansion as for imports of materials and products used for monument protection involves the presence and utilisation of outdated substances sometimes even detrimental to the monuments.

Protection, maintenance and use of cultural monuments is not confined only to the state authorities and institutes of monument care but also extends to the fields of activities of other bodies and institutions, among them: urban planning offices, construction departments and possibly nature conservation offices that have their share in the process of restoration of immovable cultural monuments, construction changes and modifications in the protected areas.

Social effectiveness of the generally beneficial work, like monument care is, can be assessed in the time horizon which reveals its resulting effects. As these effects have to be related to the educational and cultural development of population, substantial delay in the manifestation of these effects should be assumed. Moreover, the cultural and educational advancement has many dimensions, often inconspicuous ones, that avoid tangible forms of assessment.

As for the economic effectiveness and impacts, a number of methods and approaches have been examined to serve this purpose. Economic assessment of historical heritage involves in the first place the costs (resources) needed for securing their existence in the required state which means maintenance, restoration, regeneration and appropriate use of the objects and structures. In this sense, the economic value of the historical heritage components can be identified with the category of final use of resources. The issue of economic assessment covering economic reflection of intrinsic, non-economic values through economic criteria, poses a long-term challenge for scholars active in this field. Let us admit, however, that this issue is in real situations solvable only in a partial way. As we define the values of historical heritage in non-economic terms, they thus remove behind the framework of economic evaluation.

Naturally, many forms of positive economic impacts issuing from monument care and heritage protection can be supposed, estimated or taken for granted in particular context, be it financial returns of commercial activities performed in historical structures and localities, multiplication and cumulating effects generated by investments in historical localities or stimulation of employment which tourism, based on the presence of historical heritage, brings about.

The volume and composition of the Czech historical heritage stock can be derived from the Central List of Cultural Monuments where approximately 38, 7 thousands immovable monuments and 822,9 thousands movable monuments - out of which approximately 767,5 thousands. fall into the historical outfit of castles and chateaux owned by the state - have been registered. The government of the Czech Republic has declared 133 national cultural monuments. The regional heritage preservations represented 113 conservation areas (40 city reservations, 61 rural conservation areas, 10 archaeological sites and 2 additional monuments of specific spatial nature). Relatively smaller units of preservation are conservation zones (390 altogether; out of this number 209 city zones, 164 rural and 17 landscape zones).

When compared with other European countries, the selective approach to the identification of the most valuable monuments have been practised, which prevented inadequate extension of the historical heritage stock in Czech Republic recently. This approach has been applied also when preparing declaration of the conservation areas and zones.

A number of factors, many of them beyond the influence framework of the state monument care authorities and institutes, impacts the quality of renewal and maintenance the immovable monuments. In the period after the year 1989, substantially higher professional level of construction and handicraft has been reported when the completed renewal projects were put under evaluation. This was true, however, only about those projects that were supervised by professionals working in the state system of heritage preservation. In other cases, the damage inflicted to the monument instead of beneficial impact was not exceptional with the restoration work. In the large cities, particularly, number of the immovable monuments keeps to be subjected to high risk of removal or damage, due to the expansion of interests not compatible with the preservation objectives and to the increasingly aggressive behaviour of the representatives of these interests manifested also in the violation of the generally valid legal regulations from the part of some investors. New specific threats to the condition of historical building are the ownership speculations resulting in the situation when a structure (castle, mansion etc.) is kept as a forfeit (usually by a bank) and the object is left unattended in terms of maintenance and protection against devastation or theft.

The methods and results achieved in the area of the conservation of paintings, sculptures and works of decorative arts are thought remarkable and quite comparable with what is the high standard in this respect in the countries of European Union. The common practice brings the owner usually to the expectation that any work needed for amendments would be done by a qualified specialist and under the supervision of the authorised professional coming from an institution of monument care. This positive fact notwithstanding, movable cultural monuments have been put under an enormous risk brought about by thieves and vandalism. Formerly unimaginable share of the movable monument stock has been illegally exported out of the country.

Strategic objectives in the field of historical heritage preservation have been defined with the regard to the strengthening of social an economic integration of this heritage. Preservation and presentation of the monuments being the basic priority amongst these objectives, the implementation of these two functions increasingly depends on the verification of the cultural value of individual entities considered to be parts of heritage or even declared cultural or national cultural monuments. The results of new identification or re-identification of the immovable monuments should be duly incorporated into the Central List of Cultural Monuments and other key documents. The adequate number of protected and presented objects is considered an essential condition of the effective care.

When focusing on the other strategic objectives, implementation of differentiated heritage preservation within historic cultural regions comes to the forefront. The other important objectives include strengthening the legal position of the monument owners; enabling the communities actively participate in the protection and care of immovable properties and their sets which are of historical significance; enhancing the decentralisation of monument care and confining the activities of the state authorities to the preservation of

entities and areas of national significance; rationalisation of the relations between the executive and professionally oriented parts of the state system of heritage preservation; promotion of the educational and professional background of this system; provision of financial support for the owners of cultural and historical monuments by way of various forms of obligatory indirect assistance and facultative direct assistance from public budgets and at the same time strengthening rationalisation as for the direct costs of state in this respect; allowance for the widest possible involvement of citizens and civic initiatives into the heritage preservation; increase in attractiveness of the historical localities and monuments in terms of their acceptable use for tourism industry, both in domestic and international scales, and promotion of maintenance and use of presently deteriorated monuments; substantial improvement of the system securing the protection of the movable cultural monuments; intensification of the coordination within the area of legal regulations, respecting the integration with the Community Law of the European Union.

The system of monument care having been continuously adjusted to the developing demands associated with its functions, though, a range of issues to be coped with has to be taken into account. When focusing on the most relevant aspects the following problems have to be paid attention:

The heritage preservation system has not been properly prepared and equipped in terms of finance and personal resources with regard to the substantial increase in activities - particularly the ones linked with construction - on the part of monument owners after the change of political and economic conditions in 1989. This entailed slobbering of the information collecting and processing and subsequently caused that the progress in the introduction of the new legal regulations and instruments into practice has been unsatisfactory. The effectiveness of the administrative components performance has been lowered by the elimination of regional public administration units (regional committees - an authority for administration of a relatively large territory) in 1990, which has resulted in inadequate centralisation of the monument care system.

Co-operation with some of important authorities and bodies whose activities impact substantially the effectiveness of monument care has been proved to be beyond former expectations. This relates particularly to the authorities responsible for physical planning, to the construction offices in the local and district governments and in some respects to the police and custom offices.

Insufficiencies in the functioning of the Central List of Cultural Monuments can also be included among the issues to be resolved. Particularly the deficiencies in information on the owners and location of the monuments raise problems. The owner has, by law, obligation to report to the State Institute for the Preservation of Cultural Heritage, keeping administration of the List, any changes in the ownership, administration or ways of use of monuments and also its new location. In reality, however, the owners do not observe this obligation.

The movable monuments and their sets have not been completely recorded and registered, though the process of property inventory has been continuously under way. This fact has negative impacts in terms of identification of losses and damages inflicted to movable monuments as a result of criminal acting or issuing of certificates making possible sale or export of historically and culturally valuable movable monuments. Photographic documentation and digital processing of data are often lacking when the events of this kind take place.

One of essential preconditions of an appropriate care of monuments is the determination of owner's obligations, ensuring that the value of heritage entities be reliably observed in terms of protection, maintenance and restoration and at the same time the rights of the owners are not unjustifiably limited. The mentioned determination should be attained mainly through legal measures and a special law. Present situation, as the analyses demonstrate, does not comply with the requirements of the professional community dealing with heritage preservation.

The care of a historical heritage, particularly in view of possible theft or damages and also maintenance and restoration of heritage entities, cannot be carried out but by mediation

of the monument's owner. Assumably, however, the owner is sometimes not capable to recognise the historical, cultural and social values of a monument and furthermore, to identify a suitable procedure of its renewal and restoration. Even though the owner takes responsibility for keeping the value of a monument, situations when owner's acting brings up risk to the heritage property may easily occur. These situation may emerge in three basic types: The owner misses adequate information on the value of the monument which results in his tolerance to possible deterioration of the monument, by way of an inappropriate repair, maintenance etc. The owner is in possession of the basic information on the monument's value but prefers to sacrifice this value to the commercial benefit by way of changing functions of the property or admitting the change of its physical appearance and substance. The owner is knowledgeable about the monument's value and willing to provide maintenance and restoration but does not have sufficient financial resources for these purposes.

All three types of situation come about in practice and have to be challenged from the part of monument care professionals. Particularly the issue of the due direct or indirect supply of financial means from public budgets, conditioned by adequate use of the heritage entity and by the quality of restoration work, comes to the centre of attention paid to this issue by professionals and authorities active in the domain of monument care.

When making inventory of the "burning issues" found in the field of heritage preservation, we cannot omit the impact of external factors. Leaving aside such kinds of the negative outside influence like vandalism, organised thefts, intentional destruction with a view of commercial activities and devastating reconstruction arisen from ignorance, we have to observe particularly conflicts between monument care and current economic activities manifested especially by major investments. These conflicts are witnessed sometimes even in case of widely known and meticulously handled monuments but usually concern the historical structures of local or regional significance which are not much perceived by the public. It has been found very difficult for authorities and institutes of monument care to follow the developments raising these conflict and to become sufficiently capable to response to them.

The mentioned and some other difficulties existing in the system of heritage preservation notwithstanding, the achievements of the Czech monument care have been internationally recognised. This fact is beside other developments reflected by nine entries of historical monuments or sites into the World Heritage List. The international activities of Czech specialists in the field of heritage preservation and their participation in the projects of UNESCO and Council of Europe give evidence about high professional and organisational level of monument care in Czech Republic.

The above issues find their place also in the area of research and scientific projects that explicitly or in some linked respects fall into the monument care domain. The range of research and scientific activities, however, is much broader than to cover the most urgent problems and reflects many subjects significant in terms of systematic extension of knowledge system built for long-term concerns of monument care (which are of historic, architectural, artistic and other nature). The respective research projects can be sorted out by a simple criterion - whether they are conducted (co-ordinated) by the State Institute for Cultural Heritage Preservation (SICHP) or by other institutions.

In both domains, the orientation of research is very versatile, covering broad area of scientific interests. In recent time (1995 - 2000), about 25 research projects have been carried out every year in SICHP. Approximately 70 workers of SICHP have participated in research tasks, the pattern of their specialisation having included the most numerous representation of arts history (10), chemical technology (5), general history (4) and other lines. The composition of research subjects have also been diverse, comprising the task concerning the system of monument care itself (its efficiency, software serving data processing, development of the system making possible evidence and documentation using digitalized information), detailed structure documentation (less maintained historical buildings having perspective of funding reconstruction, provided they would partly serve tourism; the interiors decorations of major Baroque palaces), specific types of constructions and

settlements (historically and architecturally valuable villages, spatial identification of protected areas), technological research (technological analysis of historical paintings, scientific research of the statues located on Charles Bridge).

Research projects implemented outside the responsibility domain of SICHP (the central Institute and eight regional Institutes forming the organisational framework of SICHP) are substantially less numerous but also cover variety of subjects. The focus lies in historical analysis (e.g. Silesia and North Moravia as a specific Central European area in terms of monument care - conducted by Ostrava University; Historical development of sacral architecture in Olomouc region - conducted by Palacký University in Olomouc), in the artistic characterisation of monuments (e.g. Topography of artistic and historical monuments in Prague - the Institute of Arts History of the Czech Academy of Sciences) in archaeological research (e.g. Message of archaeology upon medieval town - Institute of Archaeology of the Czech Academy of Sciences; Spatial identification of fortified settlements in Beroun region - the Institute of Archaeological Monument Care for Central Bohemia) in technological issues (e.g. Monitoring the environmental impacts on cultural monuments and diagnose of their disturbances - the Institute of Theoretical and Applied Mechanics - Czech Academy of Sciences) in architectural aspects (e.g. Research of historic and contemporary architecture - University of Technology in Prague). Quite a number of projects being implemented in various institutions has not been conceived to focus primarily on the monument care but they generate knowledge that means also scientific progress in the area of heritage preservation.

Considering the social and economic integration of historical heritage, we have to analyse a number of aspects of present research, conceptual and organisational work as well as of practice. In this consideration, the following findings and criteria should take key position:

Cultural value of historical entities undoubtedly raises economic performance and potential of the respective locality, town, district, region. The effects brought about concentrate in the firm sector, in the market environment, in the real estate area. Above all, however, cultural and historical entities represent one of the paramount parts of both tangible and intangible components of society's and individual's "final use goods pattern".

Effectiveness of the use of resources allocated into heritage preservation is closely linked with the detailed evaluation of the effects that have to be gained. Without this evaluation, substantial risk of redundant or even harm - producing expenditures is often found present.

The heritage entities become parts of " Urban Sustainability Network" serving the maintenance and development of basic functions of a particular city or region, promotion its most valuable components and spatial expansion of desirable attributes of urban environment.

The economic and social preconditions to keep historical heritage in this position deserve increasing attention and effort.

Selected references:

- Koncepte účinnější péče o památkový fond v České republice do roku 2005 (The Concept of More Effective Care for Monument Fund till 2005), Ministry of Culture of the Czech Republic, Prague, 1998

- Macháček, J.: Ekonomické a mimoekonomické hodnocení historických měst (Economic and Non-Economic Evaluation of Historical Towns), Závěrečná zpráva k výzkumnému úkolu (Final Research Report), Ústav dějin umění, Praha, 1998

- Svatoň, J.: Komplexní analýza systému památkové péče (Comprehensive Analysis of the Monument Care System), Výzkumná zpráva (Research Report), SÚPP, Praha 2000

- Štulc, J. : Czech Republic, In: Pickard, R. (ed.): Policy and Law in Heritage Conservation, SPON Press, Taylor and Francis Group, London, 2001

- Urban, J.: Koordinace výzkumu a vývoje a zkvalitňování činností státní památkové péče (Co-ordination of Research and Development and Upgrading of Professional Activities of the State Monument Care), Výzkumná zpráva (Research Report), SÚPP, Praha 2001