

*Zabrze City Office

**Silesian University of Technology in Gliwice, Faculty of Organisation and Management

MAŁGORZATA MAŃKA-SZULIK*, IZABELA JONEK-KOWALSKA**,
MARIAN TUREK**, ANETA MICHALAK**

prezydent@um.zabrze.pl, izabela.jonek-kowalska@polsl.pl,
marian.czeslaw.turek@polsl.pl, aneta.michalak@polsl.pl

*Assessment of Development Prospects for the Industrial
Heritage Protection Institutions in Poland on the Example
of the Górny Śląsk Region*

Ocena perspektyw rozwojowych instytucji ochrony dziedzictwa przemysłowego w Polsce
na przykładzie regionu górnośląskiego

Keywords: development of institutions; SWOT analysis; PESTEL analysis; industrial heritage

Słowa kluczowe: rozwój instytucji; analiza SWOT; analiza PESTEL; dziedzictwo przemysłowe

JEL code: M10; H76; H83

Introduction

The industrial heritage protection is an important and up-to-date topic in the historical, social and civilisation context [Ifko 2016, pp. 2040–2045]. From the region's perspective, having such achievements is also a tourist and cultural attraction allowing to increase the recognition and improve the image of local government units. The European Route of Industrial Heritage (ERIH), which popularises and promotes industrial sites across Europe, is a good international practice. In Poland, promoting the industrial heritage is not centralised and institutionalised and takes place mainly within the individual actions of local government units in the field of

tourism or culture. Therefore, this paper proposes the establishment and activation of the International Documentation and Research Centre on Industrial Heritage for Tourism by the Zabrze city authorities. In such perspective, the main aim of the article is the assessment of development prospects for the industrial heritage protection institutions in Poland on the example of the Górný Śląsk region. The actions taken by the city authorities included research and development work, which identified the Centre's development potential using strategic analysis tools in the form of the SWOT matrix and the PESTEL analysis. The following sections of the paper present the results of research carried out by employees of the Institute of Economics and Informatics of the Faculty of Organisation and Management at the Silesian University of Technology, assuming the assessment of development prospects for the industrial heritage protection institutions in Poland on the example of the Górný Śląsk region as the main objective.

1. Assessment of development opportunities as an introduction to the preparation of the organisation's strategy

The International Documentation and Research Centre on Industrial Heritage for Tourism 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 an operational plan [Brol and Sztando 2009, pp. 70–71].

In a modern organisation, a business strategy is a fundamental document that defines the key priorities, objectives and results of a long-term activity. Thus, the strategy enables to define the organisation's core areas and aspirations and is a kind of 'signpost' indicating the direction in which the organisation is heading. In practice, it is the starting point for formulating detailed objectives and operational plans as well as the principles for evaluating the realised results of the activity in the context of strategic priorities. The organisation's activity without a strategy is not possible and pointless due to the lack of not only general strategic objectives, but also operational tasks [Sudoł 2006]. It is also impossible to specify the required

employee competencies and the scope of responsibilities at individual job positions. Without the information about strategic objectives and, consequently, operational objectives, it is not possible to assess the results of the activity, as it is not known what was intended to be achieved. The strategy organises the organisation's activity and eliminates the organisational chaos that prevails in it [Sztando 2008, pp. 193–194; Ziółkowski 2005, pp. 102–105]. The strategy development process for the International Documentation and Research Centre on Industrial Heritage for Tourism is presented in Figure 1.

One of the elements of preparing the strategy for the International Documentation and Research Centre on Industrial Heritage for Tourism was the assessment of stakeholders based on the results of surveys conducted among the Centre's employees, the representative of the Centre's Scientific Board and the representatives of the Zabrze City Office as the initiators and financing parties of the Centre's activity. Such a selection of respondents was aimed at identifying the expectations of both internal stakeholders related to the Centre's operational activity as well as external stakeholders shaping the strategic directions of the facility's activity. The survey questionnaire contained a diagnostic part and a forecasting part related to the potential future action areas and the principles of the Centre's operation set by the time horizon of the duration of the strategy that is to be the year 2025.

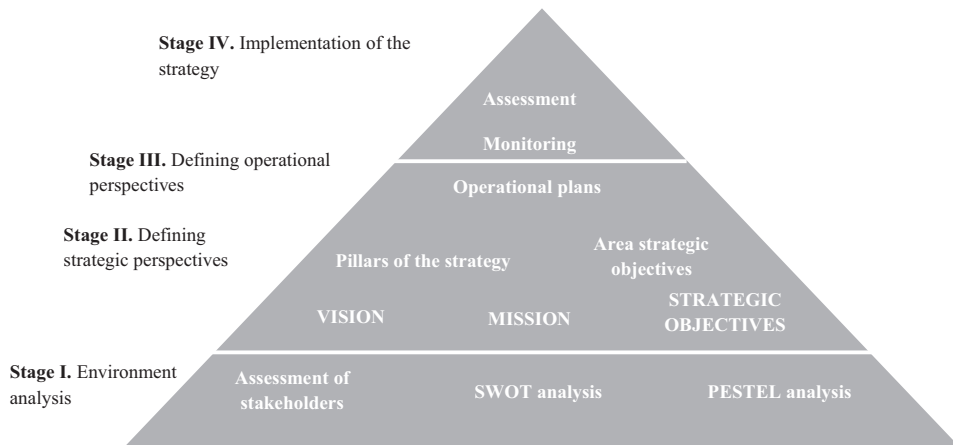


Figure 1. Strategy development process for the International Documentation and Research Centre on Industrial Heritage for Tourism

Source: Kaplan and Norton [2005].

In addition, during the first stage of preparing the strategy, the SWOT analysis and the PESTEL analysis were used in line with the recommendations of theory and general economic practice. The general principles for developing these analyses are presented in the next chapter.

2. Methodology of research

The SWOT analysis (S – strengths, W – weaknesses, O – opportunities, T – threats) is a strategic management tool used to characterise the enterprise and its environment. It enables to identify the strengths and weaknesses of a given organisation as well as the opportunities and threats generated by its environment – this is the starting point for defining further actions [Kaplan and Norton 2005].

Based on the SWOT analysis, it is possible to look for answers to the following questions improving the organisation's operation:

- Does a strength enable to make use of an opportunity?
- Does a strength allow to mitigate a given threat?
- Does a weakness limit the possibilities to make use of a given opportunity?
- Does a weakness cause an increase in the intensity of a given threat?

In turn, the SWOT analysis conducted from the outside to the inside (referred to as the TOWS) prompts to reflect on the following questions:

- Does an opportunity strengthen the strength?
- Does an opportunity mitigate the weakness?
- Does a threat reduce the strength?
- Does a threat intensify the weakness?

The list of weaknesses, strengths, threats and opportunities is analytical. It may, however, be extended by a parametric assessment and then be the starting point for preparing partial strategies, thus becoming a planning tool. At that point, the individual factors are assigned an impact score: 0 – no impact, 1 – low impact, 2 – strong impact. The SWOT analysis, based on its results, orients the organisation to choose one of four possible strategies: aggressive, conservative, competitive or defensive [Berliński and Penc-Pietrzak 2004].

The aggressive strategy is available to those organisations where there is a dominance of forces strengthened by opportunities existing in the environment. These entities gain a unique chance of intensive development. The conservative strategy occurs in the case of domination of forces strongly correlated with threats existing in the environment. Then the organisation can survive by eliminating the threats with internal assets. However, there are no significant opportunities for intensive development. In the competitive strategy, weaknesses dominate the forces, but the environment fosters the organisation's development by generating a large number of opportunities. Then the entity should focus on overcoming weaknesses to better exploit the external opportunities. Weaknesses and threats dominate in the defensive strategy. In this situation, the organisation can count only on survival [Grudzewski and Hejduk 2004].

The PESTEL analysis (P – political, E – economic, S – social, T – technological, E – environmental, L – legal) was also used at the study. It enabled to carry out a segmentation of the environment and, thus, to classify the separated barriers of the organisation's development. On the basis of the conducted analyses, a checklist of

political, economic, socio-cultural, technological, environmental and legal barriers limiting the Centre's expansion was created.

In the PESTEL analysis each segment is examined separately. These segments include the following environments:

- political (P) – conditions related to the local, regional and national policy corresponding to the immediate and farther environment, accordingly;
- economical (E) – conditions for the country's economic development and the level of wealth of society shaping the demand and prices of products and services;
- social (S) – factors related to demographic processes as well as social and cultural phenomena and trends;
- technological (T) – conditions for the development of new technologies, the technological advancement of the industry or the life cycles of individual industry sectors;
- environmental (E) – climatic and ecological conditions, including the revitalisation and management of industrial sites, and the scope of actions to protect the natural environment;
- legal (L) – factors related to the existing and called for changes in general and industry law, significantly affecting the organisation's ability to operate and its development.

The PESTEL analysis consists of three successive actions: (1) the identification of key environmental conditions, (2) the selection of factors affecting the studied organisation, and (3) the assessment of the impact of the selected factor on the functioning of the organisation. This analysis should be conducted in the organisation on a regular basis and, similarly to the strategy, adapted to the current external conditions that are important to the entity and, at the same time, independent of the entity.

3. Results of the SWOT analysis

The results of the SWOT analysis for the International Documentation and Research Centre on Industrial Heritage for Tourism in a descriptive form are presented in Figure 2 and in a quantitative form in Figure 3. It was established on the basis of deep interviews with internal and external stakeholders of the Centre and additionally on the basis of documentation studies undertaken by the authors of the article. It is clear from the presented information that the studied organisation is dominated by the opportunities existing in the environment. Undoubtedly, among the most important is the location within the industrial agglomeration, allowing direct access to the industrial heritage and opening the opportunity to take advantage of the industrial experience of the region's inhabitants, managers of undertakings or managers of economic institutions [Cercleux et al. 2012, pp. 216–225]. In this case, also the initial and ongoing support of the Zabrze authorities, both organisational and

financial, including support for the initiative to set up this Centre, is of fundamental importance for its existence. Key opportunities also include the possibility of the initially established cooperation with national and foreign institutions dealing with industrial heritage and tourism. Nevertheless, this cooperation needs to be extended and intensified, especially in the case of R&D units, which could support the Centre within both the scientific, documentation and educational areas [Łukasiewicz 2006, pp. 130–141; Potoczek 2001, pp. 147–148]. Unfortunately, the International Documentation and Research Centre on Industrial Heritage for Tourism also features many internal weaknesses, the negative impact of which on the effects of the entity's actions has clearly intensified over the past few years. The key issue here is the absence of clearly formulated strategic plan and subsequent operational plans. It is hard to consider strategy an agreement, which is only a very general declaration of cooperation made by its partners, without identifying the tasks to be performed, the principles of action or the responsibility for achieving individual results. Such an approach makes it impossible to assess the Centre's activity and control the results of its functioning. A serious operational shortcoming, directly related to the lack of strategy, is also the lack of a formal organisational structure with the separation of job positions with a predefined scope of duties and responsibilities.

In addition, the situation is complicated by the employee turnover disrupting the continuity of performance of tasks and the lack of experts in the field of industrial heritage. Currently, the less significant weaknesses include the lack of experience of the Centre's employees in the field of conducting research, which may be eliminated by cooperation with external stakeholders. The Centre is also characterised by several significant internal assets, which have been, however, developed with a strong commitment of partners and at favourable external circumstances. Undoubtedly, the Centre is a pioneer in documenting, researching and promoting the industrial heritage in Poland. Owing to the involvement of the Zabrze authorities the sources of financing of the conducted activity are also guaranteed [Miszczyk 2007, pp. 5–40]. It has also gained initial recognition through cyclically co-organised conferences devoted to the issue of industrial heritage. Nevertheless, the number of strengths – especially in the condition of a favourable external environment – is far too small and the Centre's internal potential should be considered not fully utilised.

<p style="text-align: center;">STRENGTHS</p> <p>S1. Unique nature of regional and national activity.</p> <p>S2. Pioneer position in the field of industrial heritage.</p> <p>S3. Securing the basic sources of financing by the city of Zabrze and the Marshal Office of the Śląskie Voivodeship.</p> <p>S4. Appointment of the Scientific Board supporting substantively the Centre's activity.</p> <p>S5. Promoting the Centre's activity during cyclical scientific conferences.</p>	<p style="text-align: center;">WEAKNESSES</p> <p>W1. Inadequate level of specialisation of employees in the field of industrial heritage.</p> <p>W2. Inadequate level of competences of human resources in the area of research.</p> <p>W3. Significant employee turnover.</p> <p>W4. Lack of specific descriptions of job positions and assigned tasks.</p> <p>W5. Lack of vision, mission and specified objectives.</p> <p>W6. Lack of a long-term action plan.</p> <p>W7. Lack of an operational plan.</p> <p>W8. Inadequate level of control of the accomplishment of objectives.</p> <p>W9. Lack of organisational independence.</p> <p>W10. Lack of separation of decision-making responsibility centres.</p>
<p style="text-align: center;">OPPORTUNITIES</p> <p>O1. Localisation in the industrial agglomeration.</p> <p>O2. Support of the Zabrze authorities.</p> <p>O3. Support and cooperation with the Marshal Office of the Śląskie Voivodeship.</p> <p>O4. Opportunity to cooperate and use the experience of the UNWTO (United Nations World Tourism Organisation), the PTO (Polish Tourist Organisation) and the PCT (Polish Chamber of Tourism).</p> <p>O5. Opportunity to take advantage of the assistance of higher education institutions as regards research.</p> <p>O6. Cooperation perspective with functioning institutions and undertakings in the field of collecting documentation and promoting the tangible and intangible industrial heritage.</p> <p>O7. Opportunity of integrating the Centre's activity into the Tourism Development Strategy of the Śląskie Voivodeship.</p> <p>O8. Opportunity to expand the cooperation and action area through cooperation with the Ministry of Sport and Tourism.</p> <p>O9. Perspective of activity internationalisation through contacts with foreign partners, among others, the UNWTO, representatives of the industrial tourism from Germany or France.</p> <p>O10. Utilisation of the experience in creating the ERIH (European Route of Industrial Heritage).</p> <p>O11. Increasing interest in tangible and intangible industrial heritage.</p>	<p style="text-align: center;">THREATS</p> <p>T1. Low level of recognition among local and national population.</p> <p>T2. Failure to use the potential of cooperation with the existing national partners.</p> <p>T3. Lack of external sources of financing in the form of grants and participation of other entities than the Zabrze City Office and the Marshal Office of the Śląskie Voivodeship.</p> <p>T4. Lack of interest in the Centre's activity among foreign partners.</p>

Figure 2. SWOT analysis for the International Documentation and Research Centre on Industrial Heritage for Tourism

Source: Authors' own elaboration.

	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	Total	T1	T2	T3	T4	Total
S1	2	1	1	1	2	2	2	1	1	2	15	2	2	1	2	7
S2	1	1	1	1	2	2	2	1	1	2	14	2	2	1	2	7
S3	2	0	0	0	2	2	2	1	1	1	11	0	2	2	0	4
S4	1	1	0	0	2	2	1	1	0	1	9	0	1	1	1	3
S5	1	1	0	1	2	1	1	0	0	1	8	1	1	1	1	4
Total	7	4	2	3	10	9	8	4	3	7	57	5	8	6	6	25
O1	2	1	0	1	2	2	2	2	0	2	14	0	1	0	0	1
O2	0	0	0	1	2	2	2	2	0	2	11	0	2	1	0	3
O3	0	0	0	1	2	2	2	2	1	2	12	1	2	1	0	4
O4	2	1	1	1	2	2	2	2	1	2	16	2	2	1	2	7
O5	2	2	1	2	2	2	2	2	0	2	17	2	2	1	1	6
O6	1	1	1	1	2	2	2	2	1	2	15	2	2	1	1	6
O7	2	1	0	1	2	2	2	2	0	2	14	1	1	1	1	4
O8	1	1	0	1	2	2	2	2	1	2	14	1	1	1	1	4
O9	2	2	1	2	2	2	2	2	1	2	18	2	1	1	2	6
O10	2	1	1	2	2	2	2	2	0	2	16	2	1	1	2	6
O11	1	0	0	1	2	2	2	2	0	2	12	1	1	1	1	4
Total	15	10	5	14	22	22	22	22	5	22	159	14	16	10	11	51

Figure 3. SWOT matrix as a planning tool for the International Documentation and Research Centre on Industrial Heritage for Tourism

Source: Authors' own elaboration.

It is also worth stressing that the Centre has identified few hazards. The most important ones are the potential lack of opportunity for obtaining external sources of financing and the lack of interest on the part of the Centre's partners. Both of these threats do not, however, mean the danger of destroying the effects of the Centre's activity. They are only a threat to the extent of the Centre's activity. Certainly, they can also be eliminated by the effective actions of the Centre's management and employees.

4. Results of the PESTEL analysis

The results of the PESTEL analysis for the International Documentation and Research Centre on Industrial Heritage for Tourism are presented in Table 1.

The PESTEL analysis, like the SWOT analysis, is one of the tools supporting the development of the organisation's strategy. It enables the assessment of the impact of key factors of macro- and meso-environment on strategic decisions that are made now or in the future in the entity. To this end, the analysis should take into account both the existing condition and the changes that are likely to occur in the future.

Table 1. PESTEL analysis for the International Documentation and Research Centre on Industrial Heritage for Tourism

Factors	Key factors	Impact assessment
Political	Covering the industry and technology monuments with the “Programme of Tourism Development by 2020”. ¹	Positive
	Possibility of receiving support under the programmes of the Ministry of Culture and National Heritage and EU funds (cultural heritage, promotion of Polish culture abroad).	Positive
	Approval for taking the Centre’s activity under the auspices of the Ministry of Culture and National Heritage and the Ministry of Sport and Tourism.	Positive
	Continuing the development of the industrial heritage in the region in connection with taking into consideration this task as one of the priorities in the ‘Śląskie 2020’ Śląskie Voivodeship Development Strategy and the Development Strategy for the city of Zabrze for the years 2008–2020.	Positive
Economic	Development of the Polish economy connected with an increase in GDP and the nominal value of budgetary means allocated to culture and tourism.	Positive
Social	Increasing interest in the industrial heritage in connection with the creation of the Śląskie Voivodeship Technology Monuments Trail or the Cracow Technology Trail.	Positive
Technological	Increase in the number of post-industrial sites due to the liquidation of traditional industries in the region and the country (metallurgy, mining) [Hacquebord and Avango 2016, pp. 433–440].	Positive
	Increase in the number of active industrial sites due to the development of modern industries in the Śląsk agglomeration.	Positive
Environmental	Slow pace of making the industrial heritage monuments available (process from the revitalisation to adapting to new functions).	Negative
	Low attractiveness of the investment in industrial tourism sites due to disparities between outlays and potential revenues.	Negative
	Lack of coordination of actions for industrial tourism at local, regional and national level.	Negative
Legal	Growing requirements for the safety and operation of industrial monuments.	Negative

Source: Authors’ own elaboration.

Conclusions

According to the results of the conducted SWOT analysis, the International Documentation and Research Centre on Industrial Heritage for Tourism is in a very good development situation, dominated by the opportunities existing in the external environment. It can, therefore, be said that the environment and external stakeholders are conducive to the Centre’s activity. However, an obstacle in the implementation of the aggressive strategy, which is the most favourable variant of the SWOT matrix, are the weaknesses accompanying this entity’s activity. Their overcoming will

¹ Resolution No. 143/2015 of the Board of Ministers of 18 August 2015 on the adoption of the “Programme of Tourism Development by 2020”.

enable to maximise the potential existing in the pioneering approach to documenting and researching the industrial heritage in Poland. The increase in the Centre's development opportunities is also influenced by the political, social and technological factors within its environment.

Bibliography

- Berliński, L., Penc-Pietrzak, I., *Inżynieria projektowania strategii przedsiębiorstwa*, Difin, Warszawa 2004.
- Brol, R., Sztando, A., *Teoretyczne i praktyczne aspekty planowania strategicznego w skali regionalnej i lokalnej*, [in:] M. Klamut (ed.), *Planowanie kompetencji kadr w regionie istotą rozwoju Dolnego Śląska*, Wrocław University of Economics, Wrocław 2009.
- Cercleux, A-L., Merciu, F-C., Merciu, G-L., *Models of Technical and Industrial Heritage Re-Use in Romania*, "Procedia Environmental Sciences" 2012, vol. 14.
- Grudzewski, W.M., Hejduk, I.K., *Metody projektowania systemów zarządzania*, Difin, Warszawa 2004.
- Hacquebord, L. Avango, D., *Industrial Heritage Sites in Spitsbergen (Svalbard), South Georgia and the Antarctic Peninsula: Sources of Historical Information*, "Polar Science" 2016, vol. 10, no. 3.
- Kaplan, R.S., Norton, D.P., *Strategiczna karta wyników – jak przełożyć strategię na działanie*, PWN, Warszawa 2001.
- Ifko, S., *Comprehensive Management of Industrial Heritage Sites as a Basis for Sustainable Regeneration*, "Procedia Engineering" 2016, vol. 161.
- Łukasiewicz, J., *Zasady organizacyjnej elastyczności aparatu administracji publicznej*, LexisNexis, Warszawa 2006.
- Miszczuk, A., *Samorząd terytorialny jako stymulator lokalnego i regionalnego rozwoju gospodarczego*, [in:] A. Miszuk, M. Miszczuk, K. Żuk (eds.), *Gospodarka samorządu terytorialnego*, PWN, Warszawa 2007.
- Potoczek, A., *Zarządzanie w systemie samorządu terytorialnego*, [in:] J. Adamiak, W. Kosiedowski, A. Potoczek, B. Słowińska (eds.), *Zarządzanie rozwojem regionalnym i lokalnym. Problemy teorii i praktyki*, Wydawnictwo Dom Organizatora TNOiK, Toruń 2001.
- Sudoł, S., *Przedsiębiorstwo*, PWE, Warszawa 2006.
- Sztando, A., *Typowe problemy planowania strategicznego w polskich samorządach*, [in:] M. Dylewski (ed.), *Ekonomiczne i organizacyjne instrumenty wspierania rozwoju lokalnego i regionalnego – rozwój, innowacyjność, infrastruktura. Seria ekonomiczne problemy usług*, "Academic Journal", no. 501, University of Szczecin, Szczecin 2008.
- Ziółkowski, M., *Zarządzanie strategiczne w polskim samorządzie terytorialnym*, [in:] A. Zalewski (ed.), *Nowe zarządzanie publiczne w polskim samorządzie terytorialnym*, SGH, Warszawa 2005.

Assessment of Development Prospects for the Industrial Heritage Protection Institutions in Poland on the Example of the Górny Śląsk Region

The main aim of the article is the assessment of development prospects for the industrial heritage protection institutions in Poland on the example of the Górny Śląsk region. To achieve this aim, the paper presents the results of the SWOT analysis and the PESTEL analysis of the International Documentation and Research Centre on Industrial Heritage for Tourism. According to the obtained results, the Centre's strengths – including the financial support from the Zabrze City Office – and the opportunities in the form of increasing popularity of industrial tourism allow for a positive assessment of the Centre's development prospects. Nevertheless, its continued existence and development require a complete strategy and its consistent implementation.

Ocena perspektyw rozwojowych instytucji ochrony dziedzictwa przemysłowego w Polsce na przykładzie regionu górnośląskiego

Celem głównym artykułu jest ocena perspektyw rozwojowych instytucji ochrony dziedzictwa przemysłowego w Polsce na przykładzie regionu górnośląskiego. By tak przedstawiony cel zrealizować, przedstawiono wyniki analizy SWOT i PESTEL dotyczące Międzynarodowego Centrum Dokumentacji i Badań nad Dziedzictwem Przemysłowym dla Turystyki. Zgodnie z uzyskanymi wynikami silne strony Centrum – w tym m.in. wsparcie finansowe ze strony UM Zabrze – i szanse w postaci rosnącej popularności turystyki industrialnej, pozwalają pozytywnie ocenić perspektywy rozwojowe Centrum. Niemniej jego dalsze istnienie i rozwój wymagają kompletnej strategii działania i jej konsekwentnego wdrażania.