

# MUZEOLÓGIA 3

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# The Syntax and Semantics of Modelling Exhibition Spaces: A Case Study of the Hryhorii Skovoroda National Literary and Memorial Museum, Ukraine

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*The Syntax and Semantics of Modelling Exhibition Spaces: A Case Study of the Hryhorii Skovoroda National Literary and Memorial Museum, Ukraine*

The aim of this article is to analyse the exhibition semantics of the exposition of the H.S. Skovoroda National Literary and Memorial Museum (Ukraine, Kharkiv region). The authors substantiate the concept of dearchaisation of Skovoroda's image by means of modelling the syntax and semantics of the exhibition space. According to the authors, exhibition design cannot ignore symbolism, as the principles of cultural consumption of "places of memory" function in the stream of consumption of a work of art. The viewer does not come for the subject, but for emotions and experience. Therefore, design should go beyond the physical properties of objects, subjects, compositions, and so on, and the content of any design should ultimately be the conditions for gaining new experience. The relationship between the material (object) and the imaginary (interpretation) is projected at the intersection of exhibition syntax and semantic modelling.

Keywords: museum, design, museum exhibition, semiosis, representation and signification

The importance of this small preamble to our article is due to the fact that the Hryhorii Skovoroda National Literary and Memorial Museum no longer exists. On the night of May

7, 2022, it was destroyed by the Russian military during shelling. Along with the building, the museum's exposition space burned to the ground.

Scholars say the humanities are in no hurry. Like any academic field, it requires time, balanced interpretations of sources, and a certain distance between researchers and objects of analysis. However, the war in Ukraine did not ask for our consent. Today is not our time. At the same time, researchers need to reflect on events that are usually the focus of art critics and journalists. We are convinced that our proposed analysis of the model of exhibition symmetry will be a reliable source for a new concept of the museum's exhibition space, which will certainly take the place of the destroyed institution.

### The urgency of the problem

Hryhorii Skovoroda (1722–1794), a Ukrainian wandering philosopher and writer, has long passed the stage of historical and biographical classification. The story and philosophy of his life is firmly embedded in the world's existing cultural hierarchy. Currently, the UNESCO Executive Council has made a decision regarding the list of new commemorative dates in 2022–2023, where the 300th anniversary of H. Skovoroda is defined as a significant cultural event.

Within this context, it is important to analyse how the biography and philosophy of H. Skovoroda are represented in the context of a museum exposition. Our research was based on one of the prominent places of memory of the philosopher, located in the village of Skovorodynivka in Kharkiv region.

The Hryhorii Skovoroda National Literary and Memorial Museum has been sponsoring artistic and cultural initiatives for almost half a century. Creating an exhibition design for personalised memory locations is not an easy task. This is due to the fact that the biography of the hero, and the cultural and historical contexts of its consumption, have a constant impact on all aspects of museum representation. The phenomenon of “biographical pressure” has a separate history in Ukrainian museum design, within which the exhibition of H. Skovoroda's biography is certainly one of the central themes.

Thus, it necessary to identify the most typical features of the exhibition representation, which has a significant impact on the symbolism of Skovoroda's creativity.

First of all, the historical convention on the role and place of the philosopher is of central importance in Ukrainian and world culture, where the Soviet ideologeme of the “people's” cultural hero has long dominated. Within this convention, H. Skovoroda represents the symbolic space of the Ukrainian past, which is beyond modernisation.

Secondly, the symbolism of H. Skovoroda's persona is represented by the parameters of his cultural and artistic life and the symbolic meanings already acquired in this field: philosopher, influential writer of his time, author of the *Kharkiv Fables*, and so on. This figurative construction, along with many other derivatives of it, is difficult to ignore in the narrative sense. In the form of real symbolic “knots”, it represents a significant part of his personal historical and cultural context, which, as a consequence, is extremely verbal. In this sense, Skovoroda is, first of all, a word, a text and a book. The journalistic rhetoric of the image of the wandering philosopher has a wide range of interpretations, along with all the other contexts of his life – as a composer, as a didactic pedagogist, and so on. Add to this the fact that the literary aspects of his work were used to promote the synthetic image of him as a national cultural leader in the first half of the nineteenth century, in the days of the romantic search for “ethnic roots”.

All this together can explain a certain repetitive monotony that can be observed in the design of museum exhibitions dedicated to H. Skovoroda. Symbols associated with the established image of the philosopher as, above all, a scribe, a “man of the word”, again and again provoke a return to the previously exploited model of “book – picture – object”.

Finally, but no less important for the typology of modern museum design, is the fact that many semantic meanings and points of view have been expressed (and are being expressed) on behalf of Skovoroda. We tend to consider this phenomenon as “semantic noise”, which, for authors of exhibitions, appears primarily in the form of a visual challenge. Today, in the culture and history of Ukraine, the image of H. Skovoroda exists on the scale of true iconography. Within its limits, the tradition of the usual image of Skovoroda is more important than academic considerations. In essence, the model of Skovoroda’s visual “consumption” in certain pre-understood and delineated parameters (a slender wanderer in a *zupan* (traditional jacket), with a stick in his hand and a book in his purse) is a clichéd form of personalised “memory space”. This phenomenon is not difficult to explain in the context of the romantic era of “invention of tradition”, but it is unacceptable to continue to consume within the museum symbolism of the twenty-first century.

In Ukraine, the real challenge for dearchaisation the language of exhibition design has become the tradition of “linear” symbolism, which has been actively exploited for many years in a large number of museum projects. We constantly observe this concept in Soviet and post-Soviet museum design.<sup>1</sup> Its content can be represented as a consistent “linear” narrative, where the visual (both object and image) is based on the text and acts as its “illustrator”. The design of this kind of exhibition is “animated”, because it does not contain its own tasks and “speaks” the language of the exhibition plan – a cyclic text narrative.

This problem is present in the organisation of Western European museums, where quite often, according to Verity Platt, “texts try to rationalize the visual and material power of privileged objects in verbal form, while asserting the text’s importance as a guide (or even replacement) to the viewing of such objects.”<sup>2</sup>

Thus, the high semantic reputation of H. Skovoroda continues to determine the museum-exhibition forms of production of its symbolic status and iconography. Within these limits, the issue of museum design is not so much a question of coexistence with the symbolism of Skovoroda as its overcoming and rethinking as a sign-symbolic challenge. It is obvious that:

- a) the current historical convention addresses the history of Skovoroda to the achievements of the past
- b) the personality of Skovoroda as a philosopher represents him through word, text and book, which often forms stereotypical forms of “consumption” of his history; and
- c) existing iconography imposes stereotypes on the visualisation Skovoroda’s personality rather than deepening its interpretation.

The purpose of this article is to analyse the exhibition semantics of the exposition of H.S. Skovoroda National Literary and Memorial Museum, and to substantiate the concept of dearchaisation of Skovoroda’s personality by means of modelling the syntax and semantics of the exhibition space.

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<sup>1</sup> LEGKODUH, V. K. Museum development in the Ukraine. In: *Museum International*, 19(3), 1966, pp. 142–151.

<sup>2</sup> PLATT, Verity. Art history in the temple. In: *Aethusa* 43(2), 2010, p. 213.



## Historiography of the question

Among the studies that, in our view, are the most representative of the issue in the title, it is worth noting those that focus on the analysis of various forms of exposition syntax. The variety of approaches and points of view, which are expressed on the basis of extremely diverse museum material, allows us to identify two important trends.

The first is to rethink the ways in which the various forms of historical experience museums exhibit interacts.

The problem of institutional representation of the past is the focus of the research of S.A. Crane. Her article analyses the interaction of two types of museum memory: that of the viewer, who often finds him/herself in an expositional context with preconceived assumptions and forms of personal experience; and the institutional position of the institution, which regulates its version of historical experience and its own (often very material and concretised) forms of memory. For our study, the author's conclusions are interesting primarily as an example of the analysis of the interaction of these two opposite effects of perception of a common historical past, which are represented by the museum environment through expositional norms and taboos.<sup>3</sup>

Analysis of the elasticity of exhibition design and the limits of its involvement in direct forms of reproduction of historical images is extremely relevant for a number of museum concepts in contexts where the past contains traumatic experiences. For example, N. Stead's article on Holocaust museum exhibitions raises the issue of needing to maintain a certain historical distance between events and their representation in the museum, due to the inability to present traumatic experiences and the importance of avoiding inappropriate theatricalisation. In the context of exposure design analysis, this adds important considerations to the problem of "establishing a new balance between history and experience".<sup>4</sup>

In recent years (since 2015), there has been a growing tendency in exhibition design towards the study of "audience-centred design". The focus of researchers is primarily on the problems of the consumption of design and the practice of gaining various forms of artistic experience. For example, at first glance, K. Tzortzi's highly specialised study is mainly devoted to the movement of the spectator through the museum space. The author focuses on the correspondence between the location's programmes (the design and the curator's point of view) and the perception of objects (the spectator's position) in the museum or gallery. However, Tzortzi touches on more fundamental problems that arise in the process of immersing the viewer in the exhibition environment, in particular the multiple effects of exposure perception.<sup>5</sup>

In contrast, the central theme of Marianne Achiam's article is the analysis of exhibition design as an imaginary structure that is formed, exists and is represented by the efforts of the spectator's artistic experience. From the author's point of view, this creates a major paradigm axis in the organisation of the exhibition space, which is essentially the result of the collective efforts of the producer and consumer of cultural products.<sup>6</sup>

K. Floyd considers an important issue in her thorough article analysing exhibition of photography as one of the most common means of representation of artistic and historical

<sup>3</sup> CRANE, S. A. Memory, Distortion, and History in the Museum. In: *History and Theory* 36(4), 1997, pp. 44–63.

<sup>4</sup> STEAD, N. The ruins of history: Allegories of destruction in Daniel Libeskind's Jewish Museum. In: *Open Museum Journal* 2(8), 2000, p. 13.

<sup>5</sup> TZORTZI, K. Movement in museums: Mediating between museum intent and visitor experience. In: *Museum Management and Curatorship* 29(4), 2014, pp. 327–348.

<sup>6</sup> ACHIAM, M. The role of the imagination in museum visits. In: *Nordisk Museologi* 1, 2016, pp. 89–100.

experience in the museum and gallery space. She emphasises the multiplicity of exhibition semantics, which are primarily aimed at forming the artistic and emotional experience of the audience.<sup>7</sup>

S. Hoffding, M. Rung and T. Roald consider the phenomenology of aesthetic perception of an exhibition project. Their focus is on the issue of aesthetic motivation of the viewer of the art exhibition, who should simultaneously comprehend the informative and ideological nature of the project, perceiving it as a whole.<sup>8</sup>

In general, the historiography of exposition design in the context of exhibition syntax is, in our opinion, one of the most dynamic problems. Its academic weight and fairly stable relevance among researchers confirms its systemic nature, which acts as an acute “reflective” tool for correcting the genesis of exposure.

### The concept of the exhibition: H. Skovoroda as a cultural hero

The semantics of the museum exposition is determined primarily by the importance of the symbolism of the “place of memory” that is directly related to the life and work of H. Skovoroda. The museum is located on the territory of the estate of the Kovalivsky family, which patronised the literary and educational activities of the philosopher. Therefore, today the museum space is a landscape park, which has a separate trajectory of exhibition points, and directly the garden pavilion, built in the eighteenth century. It is the only part of the estate complex that has survived to this day. Since the wing is believed to contain the room where the philosopher died in 1794, the memorial of the “place of memory” is gaining historical and biographical significance (Figure 1).



**Fig. 1:**  
*The museum exposition is located in the eighteenth-century Kovalivski family estate.*  
Author: Victor Severin, 2021

<sup>7</sup> FLOYD, Kathryn M. *Exhibition views towards a typology of the installation shot*. Instituto de História da Arte, *The Exhibition: Histories, Practices and Politics*. 2019, №. 14. Faculdade de Ciências Sociais e Humanas. Universidade Nova de Lisboa.

<sup>8</sup> HØFFDING, S., RUNG, M. and ROALD, T. Participation and Receptivity in the Art Museum: A Phenomenological Exposition. In: *Curator: The Museum Journal* 63(1), 2020, pp. 69-81.

According to Naomi Stead, this is a typical case of the formation of “a complex and sophisticated overlap between the roles of museum, monument and memorial”. This coincidence provokes many interesting effects. However, the most dominant is the importance of the museum for the “embodiment and saturation of memory with material content”. Thus, to outline the nature of the symbolism of the exposition, “the line at which the architecture (building) stops and the museum apparatus begins” is extremely necessary.<sup>9</sup>

In our opinion, such a revision of the architectural space of the monument is the southern facade with a typical provincial classicist portico. It is used by the authors of the exhibition as a point of entry into the historical and cultural context of Skovoroda’s biography. As noted above, the symbolism of travel, specific “traveling” life and “nomadic” literary pathos of the philosopher, forms a fairly well-established expositional imagery, which can not be rejected and difficult to ignore. The inscription on the grave of H. Skovoroda (“The world tried to catch me but could not”) is not only one of the most famous rhetorical formulas of the philosopher, but also evidence of the importance of the memorial content of the complex. Skovoroda’s biography of events and travels, which is rich in events and travels, has an extremely wide geography with a large number of local “memory contexts”, but they all converge in the symbolic capsule of the burial place.

Thus, the exhibition space in its symbolic focus becomes the only true reality of past historical events. In essence, the curators of the exhibition have been delegated the authority to compose a visual narrative on behalf of the hero of the exhibition and at the same time on behalf of his acquired historical memory. Such a perspective gives the authors grounds to “talk” to the audience primarily in the language of symbolism, because both the designer and museum curators are aware of how the historicity of H. Skovoroda’s personality dialogues with the artistic strategy of his story within the exhibition space and available exhibition opportunities.

## Symbolism of space, movement and exhibition logistics

### (a) Structuring visitor circulation

The structure of the museum’s exhibition space is designed in the stream of “soft design”, which does not assume the dominance of physical (material) features over the natural properties of the landscape and the historical content of the architectural monument. As Ipek Kaynar Rohloff rightly points out, “structuring visitor circulation is a major issue in museum design”<sup>10</sup> (Figure 2).



**Fig. 2:** *The structure of the museum’s exhibition space is designed according to “soft design” principles.*  
Author: Victor Severin, 2021

The Kovalevsky Garden Pavilion has an ordinary rectangular layout which covers the interior with a radial trajectory. Thus, the spectator who finds him/herself in the spatial aura of the exhibition moves within the perimeter route.

<sup>9</sup> STEAD, N. The ruins of history..., p. 2.

<sup>10</sup> KAYNAR, I. Visibility, movement paths and preferences in open plan museums: An observational and descriptive study of the Ann Arbor Hands-on Museum. In *Proceedings of the 5th International Space Syntax Symposium, Delft, The Netherlands*. 2005, June, Vol. 1317, p. 190.

Visual presentation and the consistent logistics of the exhibition can be adjusted within the structure of the room, but the construction of individual exhibition areas “nudges” the viewer (mostly through visual and plastic means) towards a particular model of movement. Within the exhibition space, exhibition objects and their generalised expositional rhetoric acquire the properties of an imaginary “text that projects symbols and is meant to be read, interpreted or perceived”.<sup>11</sup>

As Sheldon Annis notes, unlike other verbal or verbalised forms of artistic communication (for example, film, literary work, or plastic art object), “museum symbols are available in many ways (literally) and in almost endless succession and combinations.”<sup>12</sup>

This is why the choice of the method of “movement among stationary symbols” is of primary importance for the acquisition of a symbolic context and, most importantly, its comprehension.<sup>13</sup>

**(b) Exhibition acupuncture: basic and alternative ways to promote the exhibition space**



**Fig. 3:** *The expositional narrative is subordinated to the basic geometry of the room, but importance is given to the spectator’s ability to chose how they move through the space.*

Author: Victor Severin, 2021

The authors of the concept of exhibition acupuncture adhered to the idea of open choice for the audience. Within the exposition, according to Fulko Treffers, museum objects are presented as a kind of “exhibition acupuncture”, in reference to the presentation’s semantic “nodes”, but this does not stand in the way of alternative ways to promote free movement within the exhibition space.<sup>14</sup>

For example, the designed linear-planar structure of the exhibition narrative is organised in the form of a rectangle. The exposition narrative is subordinated to the basic geometry of the room, but at the same time is open in the nature of the content of the presentation. Its rhythm is not solely formed through the visual arrangement of the forms of movement of the spectator or the effects of perception of the exhibition point – but great importance is also attached to the possibility of such a choice (Figure 3).

In general, the exhibition takes into account the spatial possibilities of communication, which have an obvious “narrative potential”.

<sup>11</sup> ANNIS, Sheldon. The museum as a staging ground for symbolic action, in Kavanagh, G. (ed.). *Museum Provision and Professionalism*. Routledge, 2005, p. 20.

<sup>12</sup> Ibidem.

<sup>13</sup> Ibidem.

<sup>14</sup> CAVALLO, R. Stadsvernieuwing: een kwestie van kansen Ontwerpprojecten voor AmsterdamOost. In: *OverHolland* 14/15, 2014, pp. 5–30.



Within it, the exhibition narrative is able to “structure the sense of space and spaces can ‘hold’ or ‘carry’ narrative”.<sup>15</sup> Ultimately, this provides an opportunity to generalise the most suitable way to symbolise the area by manipulating the physical and interpretive properties of the room and the exhibition. These symbolic “nodes” become a means of narrative transmission, based on the experience gained and accumulated by the viewer. Thus, the question of its determination is a problem of the variability of the exhibition space, which should not prevent the viewer from gaining aesthetic and intellectual experiences in its natural sequence (in many cases, asymmetric and non-linear).

For example, the arched passage “The Wandering Philosopher at the Gates of Life”, located in Hall No. 1, was built as a museum installation (Figure 4). Within the exposition, the gate of the passage, at first glance, is perceived as a means of zoning the room. However, as an independent spatial object, the arched passage, first of all, separates the life story of the viewer from the semantic pathos of H. Skovoroda’s biography. Passing through the gate, the viewer finds him/herself in the connotations of a literary narrative, where the conventionality of material and symbolic presentation is reproduced according to other narrative norms. In a sense, the viewer is immersed in the social role of the hero, getting involved in solving his life’s conflicts and problems of choice.



**Fig. 4:** Arch passage “Wandering philosopher at the gates of life”, located in Hall No.1.  
Author: Victor Severin, 2021.

The semantics of the exposition in front of the arch passage orients the viewer to the cultural and historical context of the chronotope of Skovoroda’s biography. This is a conditional territory of the subject narrative of the eighteenth century, where almost all everyday items

<sup>15</sup> MACLEOD, S., DODD, J., & DUNCAN, T. New museum design cultures: Harnessing the potential of design and “design thinking” in museums. In: *Museum Management and Curatorship* 30(4), 2015, pp. 323–324.

are at the same time bearers of ritual and everyday symbolism. It is important to emphasise that Skovoroda's philosophy is imbued with a call to the "world of simple things" and the commonality of "divine" symbols.

**(c) Symbolic "nodes" of the exhibition within the principle of individual perception of objects and space**

We think it is important to emphasise Kali Tzortzi's ideas on the "tension of intentions" created by museum design within almost any exhibition concept, be it consistent or flexible. The design of the space is concretely related to the didactics of choice and flexibility in the retransmission of exhibition information. Referring to the works of M. Brawne, Tzortzi points out that, first of all, "navigation in museums is related to an *intent*";<sup>16</sup> and these intents are always in a narrow range of "sequences that are deliberately manipulated" and 'mosaic' of presentation, which constructs the seriality of the exhibition model and declares the freedom of perception of space".<sup>17</sup>

It is within this true "network of spatial links, and ... route choices" that the most fundamental pattern of museification of places of memory and biographical narratives becomes apparent: "Each visitor experiences the objects in an individual way" without losing the general sense of the narrative<sup>18</sup>.

For example, the exhibition contains a large number of objects that characterise the context of Skovoroda's biography. At the same time, some of the exhibits are directly related to the everyday life of the philosopher and his travels, or were among his personal belongings. And although the latter group is not numerous due to the extremely complex verification procedure, the very fact of its existence testifies to the direct presence of Skovoroda's history in material "traces" and "signs".

In the first exhibition hall, the viewer is offered a symbolic retransmission of H. Skovoroda's biography through interaction with the iconic "points" and "places" of in his life which later formed the general image of the wandering philosopher. "Nodal" symbols represented through the utensils of the late eighteenth – early nineteenth century, help the viewer to immerse themselves in the atmosphere of "objecthood" regarding the life and times of H. Skovoroda (Figure 5).



**Fig. 5:** *Subjects of the late-eighteenth to early-nineteenth century, representing the context of life and work of the philosopher. Author: Victor Severin, 2021.*

<sup>16</sup> M. Brawne, cited in TZORTZI, K. Movement in museums..., p. 328 (emphasis in original).

<sup>17</sup> Ibidem, p. 329.

<sup>18</sup> Ibidem, p. 346.

## Symbolism of compositional and plastic relations in exhibition design

In this section we consider compositional and plastic relations in the design of exhibitions. Compositional relations refer to the integrity of interaction among elements within the constituent system. The nature of compositional relations determines the features of the type of interaction, which can have various means of expression (for example, dynamic, static, variable). In exhibition design, compositional relationships are one of the most important means of building exhibition semantics. Plastic relations are a set of interactions that arise between the exhibition space and the morphology of the objects located within it. The shape of the object affects the nature of its location and its coexistence with other objects.

### (a) The plurality of subject symbolism

In the study of compositional and plastic possibilities of exhibitions, it is necessary to pay attention, first of all, to the “multivocal” and “polyvalent” aspects of subject symbolism, which allows museum objects to “speak with many meanings and in many combinations”.<sup>19</sup>

For example, exhibition planes play an important role in the system of symbolism in the compositional design of an exposition. Its organisational essence is to form a holistic structure of representation that regulates the modes of interaction with the contexts of the museum narrative (especially the modes of entering and exiting a particular story). As the general concept of the exposition is built within the perimeter route, the elements of the exposition located near the wall (information stands, exhibition points, installations, etc.) acquire a special semantic meaning.

The vertical plane of the exposition is designed for the traditional system of perception, focusing on the typical angle of visual contact by visitors. Kathryn M. Floyd calls this a “typical installation shot’s point of view”.<sup>20</sup> The horizontal plane, on the other hand, sets the mode of perception from top to bottom, forming the effect of the depth of the narrative and the need to “immerse” one’s self in the inner space of the narrative. So, the vertical is a conversation of equals with equals, while the horizontal is an immersion in history, a step into the middle of the narrative. Between these two exhibition planes there is a central idea of the organisation of the rhythm of the narrative. This involves periodic changes in the effects of exposure perception. It allows the viewer to choose contexts, sequences and points of view, while also regulating the “depth” of viewing modes.

### (b) The symbolism of iconography of Skovoroda as compositional and plastic rhetoric

A separate problem for the compositional-plastic organisation is the symbolism of the work of art, which in one aspect or another becomes a participant in the object exhibition (stand) or exhibition narrative (story).

According to our observations, the use of an author’s works of art in the exhibition concept provokes a specific model of perception which can be conditionally defined as the exhibition’s semantics of “intentionality” (Figure 6). This problem, as a kind of challenge to traditional museum design, is not new in the study of iconic paradigms of exhibition technology. In this regard, Kathryn Floyd believes that in the exhibition, regardless of the specifics of its

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<sup>19</sup> ANNIS, *The museum as a staging ground ...*, p.19.

<sup>20</sup> FLOYD, *Exhibition views ...*, p.95.

typological or genre status, exhibits which are themselves works of art acquire the meaning of “images, pictures, paintings, compositions”<sup>21</sup>.



**Fig. 6:** *The exposition includes in its structure many authors' works and remarks.*  
Author: Victor Severin, 2021

In our case, this role of artistic “capsules”, which have their own artistic program and are regulated and self-sufficient compositional manifestos, is assigned primarily to paintings and sculptures. The exposition includes several original works and replicas (in particular, the famous twentieth-century Ukrainian sculptor Ivan Kavaleridze), as well as works by contemporary artists (artist Oleg Lazarenko, sculptor Peter Mos, etc.).

Works of art play an important role in the organisation of the exhibition's thematic complexes. They are actively involved in arranging the narrative presentation and act as an illustrator of the subject's biography. The formation of such a parallel artistic interpretation is a well-known technique in exhibition design. In this case, we pay attention to the special symbolism of the plastic arts, which offer a route to the artistic analysis of Skovoroda's work without violating the autonomy with which audiences perceive it. The works of art presented in the compositional whole of the exhibition have no documentary status. These works of art artistically generalise reality, offering parallel authorial considerations that should complement the viewer's experience and encourage him/her to consider things anew.

### (c) Representation of Skovoroda's literary and philosophical ideas through a system of compositional and plastic solutions

As an example of the compositional-plastic syntax of the exposition, let us analyse the symbolism of the mirror, which, outside of its material nature, is an extremely common artistic image in the literature and poetry of the Enlightenment. In H. Skovoroda's philosophy, it

<sup>21</sup> Ibidem, p. 94.



acquires special significance as a “reflection” of truth and the search for its divine meaning (which are, in fact, systemic ideas in Skovoroda’s epistemology).

Within the exposition, the mirror not only serves its natural purpose, but also acts in an emblematic context. Reflection allows the designer to add adjacent planes and objects to the exhibition narrative, creating an illusory spatial geometry of the room and complementing the perception of the subject environment. The viewer, who falls into the intersection of reflections, acquires a new experience of an “exchange of identities”.<sup>22</sup> Self-determination (actually, self-identification) is a process of gaining a variety of experiences, which are often rooted in the life stories and creative achievements of prominent figures of the past. This allows the viewer to consume the “cultural hero” as a number of potential identities.

Working with the metaphor of Skovoroda’s literary and artistic heritage brings not only his presented literary ideas but also his visual codes to the exhibition space. In particular, one of the most famous examples of Skovoroda’s visualisation of his own apocrypha is the drawing “Source of Pure Water” (“Fountain”), which was made for his hand-written manuscript by one of his circle of friends during the philosopher’s lifetime (Figure 7). The metaphor of water (wisdom) as the only source that evenly fills nearby forms and containers is no departure from Skovoroda’s poetry and prose. It is not surprising that his periodic appeal to the idea of “the fountain of God’s wisdom” has become a philosophical maxim.



**Fig. 7:** Example of visualization of H. Skovoroda’s apocrypha on the basis of the author’s drawing, “Source of pure water” (“Fountain”, late eighteenth century). Author: Victor Severin, 2021.

In the exposition this idea is embodied by means of compositional-plastic syntax. The drawing from Skovoroda’s manuscript is presented as an installation. Its scale and spatial organisation are adapted to the general exhibition design for this part of the

museum premises. A review perspective makes it possible to visually capture the completeness of the metaphor. Subject elements (all items included in the exhibition) help us to understand Skovoroda’s philosophical ideas represented verbally.

In general, the semantics of exhibition design is an integral part of the context; it generates meaningful and eventful structures that give both individual exhibits and the overall exhibition visible symbolic meaning. In turn, the visual concretisation of this wide range of meanings is obtained by compositional and plastic means which provoke the plurality of identities of the spectator and the plurality of social roles that the museum can offer the visitor within the “history of Skovoroda”.

<sup>22</sup> FALK, J. H. An identity-centered approach to understanding museum learning. *Curator: The Museum Journal* 49(2), 2006, p. 153.

## The artistic nature of symbolism: The problem of the artistic language of exhibition design

As we showed in the first part of this study, the symbolism of H. Skovoroda's life and creative output has a broad intellectual historiography and he is the subject of considerable cultural consumption today. It is therefore a fundamentally important task to outline the exhibition's semantic program, with particular focus on its artistic and stylistic nature, where the principle of symbolic accumulation of value is important for the representation of cultural codes. Within its limits, the exhibition acts as a specific and specially designed environment, thanks to which stories become known and accumulate valuable meanings.<sup>23</sup>

All this raises the questions: what is the symbolic language designed by the exhibition manifesto, and how do its cumulative properties express themselves?

The problem of the artistic language of exhibition design today is the existence of quite different, although not opposite, points of view. For example, Sharon Macdonald considers the "language" of exhibition design as an inter-media category that outlines the universal field of content: from the physical appearance of the museum object to the system of perception of the exhibition in direct and remote modes.<sup>24</sup> Its positive connotation of design language follows from the combination of the concepts of "media, sociality and space" – three categories that determine the contextuality of the exhibition. Thus, multiple models of interaction between the spectator, the exhibition object and the community intersect within a specific exhibition space, which is generally possible only within the framework of joint artistic speech.<sup>25</sup>

Within the opposite position, the language of exhibition design is considered in the form of a challenge facing the viewer. Let us recall at least the recent discussion about the perception of museums as "intimidating spaces with a language all of their own".<sup>26</sup>

In our opinion, this issue raises the issue of exhibition "syntax". The language of exhibition design is both a problem of symbolism and a question of the integrity of the consumer's consumption of the exhibition. In many cases, the asymmetry and multiplicity of perception of the exhibition is understood as a solution to a semantic problem.

Within the Skovoroda Museum, artistic and figurative decisions are dictated by both functional and semantic tasks. According to the authors, exposition stylistics are formed as a combination of technical and technological capabilities with design form and compositional-plastic vision.

The first rectangular room, which sets out Skovoroda's biography and focuses on his travels, "transmits" the viewer from one exhibition area to another through the interplay of planes: horizontal (movement along objects) and vertical (rhythmic acupuncture point, interrupting movement, stops the viewer).

In the second room, which is built as a universal space presenting the narrative of Skovoroda's biography in the context of social memory, the wavy lines of the facades of the exhibition equipment envelop the space, modelling multiple and free trajectories within a game of volumes. This exhibition hall is multifunctional, so its general organisation is essentially

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<sup>23</sup> GREENBERG, Reesa, Bruce W. FERGUSON, and Sandy NAIRNE (eds.). *Thinking about Exhibitions*. London: Routledge, 1996, p.2.

<sup>24</sup> MACDONALD, S. Interconnecting: Museum visiting and exhibition design. In: *CoDesign* 3(S1), 2007, p.160.

<sup>25</sup> *Ibidem*, p. 150.

<sup>26</sup> HØFFDING, S., RUNG, M. and ROALD, T. Participation and Receptivity in the Art Museum: A Phenomenological Exposition. In: *Curator: The Museum Journal* 63(1), 2020, p. 78.

modular: the point of entry into space forms lines of movement that delineate planes and reveal the functions of the narrative (exhibition objects, exhibits, etc.).

Finally, the third room, which gathers together the historiography of Skovoroda's work, combines the wavy morphology of horizontal planes (a wall-mounted exposition display) with the active involvement of inter-window space. It functions as a part of the monumental and decorative expression of the interior of the room. These elements are made as semicircular arches, sending the viewer to the symbolism of the Byzantine (actually, ancient Russian) cross-domed church with its specific rounded interior shapes and characteristic arched vaults. The temple, in this case, is a metaphor for the space of memory of the narrative of Skovoroda. This room offers a narrative about the role and place of the philosopher in today's existence of symbols and literary and philosophical plots.

As we can see, the general artistic and figurative complex of the exposition has an obvious morphological orientation. The exhibition's "syntax" builds the imagined conversation through compositional and plastic means, offering figurative and stylistic accents as possible (but not obligatory) trajectories. In this a design system, the viewer is central.

## Discussion and suggestions

Exhibition design involves modelling symbolism in all its meanings (visual, textual, imaginary, etc.). The objects of museum design research are usually facts and phenomena of the past that are chronologically distant from the modern viewer. For this reason, the exhibition concept is based, rather, on the idea of "foreign" empirical experience, which is mainly represented by historiographical models and visual conventions (for example, iconography). The formation of one's own viewer experience is carried out with the help of a number of practices, which, in fact, are models of non-existent events, processes and phenomena. Therefore, the creation of historically representative models of expository symbolism is almost the only possible option for the movement towards integrity in the knowledge of various forms of existence of the past.

The semantics of the exhibition involves the creation of an imaginary, detached model of the cultural-historical process (or phenomenon or group of phenomena), the content and features of which are assumed and justified by objectively existing circumstances in the past.

Among the various types of semantic modelling, there are three main ones that are, in our opinion, effective in solving exhibition problems.

The most common type is isomorphic modelling. It is based on the objective property of real phenomena to leave identical (in one sense or another) "imprints" which, when "read" by the viewer, can be used to represent non-existent phenomena and objects. We emphasise that the "imprint" or "trace" is not the object or phenomenon itself, and only its interpretation allows the viewer to compare the former with the latter.

This pattern defines the field of possibilities of exhibition design, first of all, in the mode of interaction with material objects, as the most traditional expression of the representation of the historical "trace". For example, Todd Oakley believes that the "ritual of the museum visit" determines the status of the museum representation of the exhibition per se. Within this, there is a mutual recognition of "more-or-less isomorphic relationship between what the producer intends to be represented and what the interpreter (viewer) understands in return."<sup>27</sup>

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<sup>27</sup> OAKLEY, T. Mapping the museum space: Verbal and nonverbal semiosis in a public art museum. In: *Almen Semiotik* 16, 2002, p. 84.

An additional means of representation – the second integral part of the “museum ritual” – is symbolism, which is, in a way, an interpretive addition to the material certainty of the museum object.

Contextual modelling of symbolism is no less common. This is a type of exposition practice that focuses not only directly on the object of study, but also on related processes, circumstances and objects. Contextual properties of exposition-exhibition symbolism have been repeatedly outlined in various aspects of museum design research. For example, Marianne Achiam interprets the context in the context of the concept of “museum representation”, which is designed in three parallel modes of viewer contact with the exhibition space: associations, predictions and assumptions. All three operations require the imagination of the viewer and exist in all forms of time (for example, in parallel in the past and in the future), as well as in a virtual (timeless) context.<sup>28</sup>

Finally, locus modelling enables the design of so-called interpretive localised spaces – sets of values and qualities that are determined not only by the nature of the object (for example, “black, dirty, rounded” or “white, clean, rectangular”), but also its location in real physical space or in the imaginary space of a work of art. Determining the nature of the interaction of locus environments (sets of objects or phenomena that are part of a certain “range”) is a separate task of this type of modelling.

For example, the typical locus of Hryhorii Skovoroda as a philosopher is outlined for the designer in an already understood range of objects and phenomena, as well as the typicality of historical behaviour. These ultimately, become the main objects of design.

Thus, the design of the exhibition is designed by combining exhibition syntax with semantic models of representation of Skovoroda’s biography (isomorphic, contextual and locus). As we can see, all three proposed types of modelling are aimed at solving a set of problems that are somehow related to the idea of “non-existent” past, which is the subject of exposure within a particular space and through specific material objects.

The semantics of the exhibition are represented, as described in this article, by three main forms of expositional interaction. Within its limits:

- (a) the semantics of space is responsible for behavioural strategies and general perception scenarios;
- (b) the semantics of compositional-plastic solutions determines the specificity, a kind of thinking object; and
- (c) the artistic component of the exhibition is a rhetorical means of interpreting the exhibition context.

The acquisition of symbolic significance by the exhibition space is the final level at which the exposition begins to function as a whole. In the eyes of the viewer, it acquires its own identity and symbolic expressiveness, which not only regulates certain patterns of behaviour, but also offers strategies for interpretation and directions for new experiences.

At the same time, this is not enough when it comes to designing and organising exhibitions. The system of semantic representation which arises in the space of these three forms generates a considerable typology of combinations. Viewers generate interpretations in different ways and in an infinite number of modes of perception. Their patterns of behaviour are influenced

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<sup>28</sup> ACHIAM, M. The role of the imagination in museum visits... p. 92.

by many factors, including key ones that need to be regulated at the design level.

That is why Hryhorii Skovoroda Museum uses a model of exhibition semantics that is presented in the form of coordination of two parallel modes of symbolism construction:

- (a) formal, regulating primarily the material content of the exhibition as an artistic whole (space / composition / image);
- (b) interpretive, summarising the historical narrative of Skovoroda’s biography as a typology of modelling: isomorphic, contextual and locus (Table 1).

		ISOMORPHY		CONTEXT		LANGUAGE
SPACE	A	key feature	B	minor feature	B	minor feature
COMPOSITION	B	minor feature	A	key feature	B	minor feature
IMAGE	B	minor feature	B	minor feature	A	key feature

**Tab. 1:** *The relationships between semantic forms and models*

Note that the position of the viewer, as a recipient of exhibition design, is dynamic. The viewer, by definition, has a subjective apparatus of perception. Therefore, the design tools are aimed at forming a conventional (contractual) strategy between what the authors of the concept declare and what the viewer has the opportunity to consume. This conditional convention in presenting H. Skovoroda’s narrative is a symbolic construction which is both formed and consumed according to semantic principles.

Thus, the isomorphic model gives the materially outlined accents in the biography of H. Skovoroda a chance to be deciphered correctly and consciously. The exhibition space, saturated with specific museum objects and the subject’s background, sends the viewer to the isomorphism of the symbolism of Skovoroda’s literary and philosophical “behaviour”.

The contextual model provides the visuality and helps represent the circumstances of the life and work of the philosopher. At the same time, we emphasise once again that the exposition “migrates” in the space of colourful narratives, some of which represent the chronotope of Skovoroda’s life and some the context of his symbolic “consumption” as a cultural hero. This secondary (acquired after his death) part of his biography has long been “diffused” with his visual and artistic image, and in many fragments of Skovoroda’s narrative he works on an equal footing with the proven facts and events of his life.

Finally, all these approaches allow us to state the presence of a symbolic locus of H. Skovoroda. The museum becomes not just a place of memory or a “local” historical territory that outlines a part of the philosopher’s biography; in fact, the historical and cultural significance of exhibition design becomes obvious when the viewer sees a holistic picture of his visual and narrative image according to certain features of H. Skovoroda’s fragmented biography.

## Conclusions

Exhibition syntax is formed between three points of view, where the material (actually, exhibition objects and subject environment) interacts with the interpretive (the viewer’s point of view, features of the chronotope and the atmosphere of the exhibition).

First, we have the point of view of space, traffic and exhibition logistics. Together, these outline the specific material nature of the place – a kind of paradigm of exhibition rhetoric. Familiarity with this paradigm allows the viewer to understand the basic possibilities of moving through the space of the exhibition, interacting with the objects and visualised narratives.

The second point of view is the symbolism of the compositional and plastic features of the exhibition, which regulate the scaling, angle and rhythmic organisation. The plasticity of the exhibition narrative is an important element in the interpretation of the project content. Using compositional means as tools, the authors of the concept provide the opportunity to create the effects of perception that are so necessary for the viewer to form their own view of the life story of Skovoroda.

Finally, the third point of view orients the viewer in the system of artistic and stylistic symbolism. Its semantic basis is the disclosure of an author's artistic language for a project. Within these limits, the basic aesthetic norms of the artistic-expositional narrative are determined and the direct formation of attractive interaction with the spectator is carried out.

Today, Skovoroda's image needs to be cleansed of "ideological dirt". At the design level, this process is associated with the production of a representative and, at the same time, elastic space. This approach should help the viewer to get "their" Skovoroda (based on the principle "design for all – consume individually").

Exhibition design cannot ignore symbolism, as the principles of cultural consumption of "places of memory" operate in the stream of consumption of a work of art. In other words, the viewer does not come for the subject but for emotions and experiences. Therefore, design should go beyond the physical properties of objects, subjects, compositions, and so on, and the subject of design should ultimately be the conditions for gaining experience.

From our point of view, design in general and museum design in particular are an example of the importance of the effects of perception, which in their symbolic meaning is the most argumentative tool for organising a museum narrative. The call to narrative or the proposal to obtain a certain life story is only a visible part of the elastic space of the exhibition, which arises as a result of communication between various forms of material and imaginary, artistically concrete and interpretive. In general, returning to the concept of Kali Tzortzi on the "tension of intentions", we must state the inevitability of a combination of relations "between spaces and objects", which ultimately allow "modern museums to form an individual culture of visit" within the typical paradigms of museum and exhibition life.<sup>29</sup>

The design of the exposition should provide opportunities for multiple interpretations; this is the key to dearchaising the image of Skovoroda. Therefore, the relationship between the material (object) and the imaginary (interpretation) is projected at the intersection of exhibition syntax and semantic modelling. Within these limits, the design is aimed at:

- a) covering all "biographical potential", even within non-academic forms of representation (for example, Skovoroda as the first domestic hipster);
- b) the formation of individual "conversations in conversation" (sub-narratives) that generate "brand" stories against the background of a well-known historical context;
- c) the creation of active contexts in H. Skovoroda's history, which, according to the principles of the "growth point", make modern images of interpretation relevant.

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<sup>29</sup> TZORTZI, K. Movement in museums..., p. 347

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# Can the Museum Be an Agent of Social Change? A New Model of the Functioning of the Museum in the Twenty-First Century

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## *Can the Museum Be an Agent of Social Change? A New Model of the Functioning of the Museum in the Twenty-First Century*

A large group of scholars believe that, in the face of an increasing awareness of global challenges, the mission, role, values and responsibilities of museums as institutions require radical rethinking and transformation. In 2016, at an ICOM conference, Mário Moutinho suggested that the category of new museology be broadened towards sociomuseology as a school of thought, whose task is to integrate efforts to adapt museum structures to the present-day reality, to achieve a new level of autonomy for museums, and to open museums to the social context. The philosophical basis for this movement is the idea of participation, and its goal is to create a network of institutions, communities and individuals whose objective is sustainable local development. This approach to museum activism means modifying the tasks the museum undertakes as a civic institution, and the new model of its operation is aimed at real political, social and environmental change. The concept has met with criticism from researchers and museologists who believe that the museum should preserve its identity and focus on its traditional tasks. By giving examples of similar activity conducted by some Polish historical museums the author offers answers to the question of whether and to what extent museums in the twenty-first century can and should adopt this new model in order to truly influence their environment while, at the same time, preserving the functions of an institution whose role is to protect national heritage.

Keywords: museum activism, participation, social change, historical museums

Museums, as specific reservoirs of ways of representing past events, are a key element in the processes of rationalisation and institutionalisation of history and contribute significantly to the development of professions that provide trust-based services. It is they that legitimise and interpret the past for the visitors, while their wide impact and social authority make them jointly responsible for the shape of collective memory. At the same time, the public character of exhibitions means they reflect contemporary tensions between wide access and elitism, popular knowledge and expert knowledge, the conferral of significance and the casting doubt upon it, and also between the market value of an exhibition and its mission.

From the perspective of contemporary analyses, museums are often perceived as institutions that instil specific values and serve the needs of the state and the dominant interest groups within it. On the basis of Michel Foucault's theory, which interprets cultural practices in terms of the growing regulation of culture by the state through knowledge–authority discourses, some scholars treat museums as a combination of historical structures and narratives, exhibition practices and strategies, as well as interests and imperatives of various (ruling) ideologies. In



their studies they strive to expose structures, rites and procedures, as well as relations occurring between objects and ideological processes of persuasion.<sup>1</sup>

At present, however, the museum as an institution is undergoing multifaceted transformations that arise not only from the emergence of technologically advanced solutions applied at exhibitions but also, and primarily, from socio-cultural changes which introduced debates over the functions and tasks of cultural institutions in the twenty-first century. Public institutions have to attract visitors, identify their expectations and meet them. If they are expected to provide an environment that actively influences the ways people perceive past events, they have to vividly respond to the demands of the present. Museums are increasingly becoming institutions aimed at serving their communities, focusing their interest on the most pressing problems and ideas of the present time: Lord Gail Dexter calls them “civil society institutions.”<sup>2</sup> The presentation of knowledge is not, and has never been, the only duty of museums. As tools of civic education they have always exercised didactic functions. Currently, this means developing the ability to think critically and to use knowledge, with the aim of enabling museum visitors to make conscious and justified decisions.

With the establishment of new museum institutions, there has been a growing interest in museums from the perspective of theoretical conceptions. Increasingly, the scientific press and periodicals publish articles that analyse in depth both particular exhibitions and (at a more advanced level) theoretical museological categories. Topics that not long ago were of interest only to a small group of museologists have now become widely commented on by journalists, historians, politicians, and, finally, by the broader visiting public.

A response to the foregoing phenomena was the paradigm of “new museology” that suggested that museums should go beyond traditionally conceived functions and focus on communication with the public and support for local communities.<sup>3</sup> An attempt to correct the museological course was also proposed by Robert R. Jones, who advocated putting the concept of “mindful museum” into practice. In works published in 2009 and 2010, Jones observed that most museums largely avoid deeper social involvement both from the ethical and practical angle. Consequently, these institutions become prisoners of free-market imperatives and their own internal programs. In this context, “mindfulness” denotes asking fundamental questions about the overriding goal of museum activism in the broader context. The collection, preservation and interpretation of objects should, he argued, become means to more comprehensive ends and, specifically, to the rejection of market ideology and achievement of more fundamental values – not in the form of successive levels of perfection and professionalism but by increasing the degree of active involvement with the surrounding world.<sup>4</sup>

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<sup>1</sup> See: SHERMAN, Daniel J and ROGOFF, Irit. Introduction: Frameworks for Critical Analysis. In: Daniel J. Sherman and Irit Rogoff (eds.) *Museum Culture. Histories – Discourses – Spectacles*. Minneapolis: University of Minnesota Press, 1994; HOOPER-GREENHILL, Eilean. *Museums and the Shaping of Knowledge*. London and New York: Routledge, 1992; KOLARIKOVÁ, Veronika. The museum exhibition in the context of dispositive analysis. In: *Muzeológia a kultúrne dedičstvo*, 10(3), 2022, pp. 5–31; ZIĘBIŃSKA-WITEK, Anna. *Historia w muzeach. Studium ekspozycji Holokaustu*. Lublin: Wydawnictwo UMCS, 2011.

<sup>2</sup> LORD, Gail Dexter. Museum as Social Institutions. In Barry Lord, Gail Dexter Lord and Lindsay Martin (eds.), *Manual of Museum Planning: Sustainable Space, Facilities, and Operations*. Lanham: AltaMira Press, 2012, p. 47.

<sup>3</sup> MAYRAND, Pierre. The new museology proclaimed. In: *Museum*, 148, 1985, p. 201,

<sup>4</sup> JANES, Robert R. *Museums in a Troubled World: Renewal, Irrelevance or Collapse?* Abingdon and New York: Routledge, 2009, pp. 147–169; JANES, Robert R. The Mindful Museum. In: *Curator, The Museum Journal*, 53, 2010, pp. 325–338.

In 2016, at an ICOM (International Council of Museums) conference, Mário Moutinho proposed that the above-mentioned categories be broadened and proposed that the new museology be understood as a movement, a philosophy and a school of thought. He termed the whole concept “sociomuseology” or “new museology” in its mature form. It is the task of sociomuseology, as a school of thought, to integrate efforts to adapt museum structures to the present-day reality, to achieve a new level of autonomy for museums as institutions, and to open museums to the social context, with the idea of participation as the philosophical basis. The purpose of the movement is to create a network of institutions, communities and individuals aimed at sustainable local development.<sup>5</sup>

The concepts of the “mindful” museum and sociomuseology were eventually combined and expanded by Robert Janes and Richard Sandell, who, in their 2019 book, used the category of museum activism in the sense of the development of museum practice based on ethical values and argued for bringing actual political, social and environmental values into the picture. According to the two scholars, in the face of the growing awareness of global challenges, the mission, role, values and duties of museums require radical rethinking and transformation. In this vision, museums should become institutions that provide their communities with tools of “intellectual self-defense” against manipulation and management conducted in the interest of the dominant political or economic goals. Activism also denotes resistance, or, as the two scholars see it, a critical challenging and redefining of the status quo.<sup>6</sup> Museums are not guilty of causing social inequalities, yet they cannot remain indifferent to the problem of shaping the political conditions in which all social groups can be guaranteed equal rights, or at least the possibility of their enforcement. Janes and Sandell call reflection and active measures in this direction a moral imperative of the museum as a civic institution.<sup>7</sup> In these circumstances, the two scholars use the term “immorality of inaction”, since, they believe, inaction is incompatible with the ethical obligations of museums, or even immoral.<sup>8</sup>

The museum can also perform the function of an early warning system. Global social problems do not arise suddenly; there are many warning signs that turn into crises after some time. Even if museums are not able to contribute to solving global problems, they can help create the picture of the desired future for themselves and their community. This is always the first and indispensable step towards carrying out a recovery plan. The position of museums is exceptional in this case: their activity combines knowledge, the perspective of time and social authority.<sup>9</sup> This kind of museum would be a temporary institution necessary for the formulation and presentation of a new narrative that can challenge myths and mistaken notions, reverse expansionist tendencies, end rampant consumption and halt the destruction of the planet.

The expansion of the museum mission and the adoption by museums of the function of a social justice advocate did not meet with universal approval from all museologists. Chet Orloff, a history professor and museologist from Portland, Oregon, in his commentary on the debates at the 2016 ICOM Conference, criticised the argument about the need for museums to actively

<sup>5</sup> MOUTINHO, Mário, *From New museology to Sociomuseology*. 24th General Conference of the International Council of Museums in 2016. Accessed June 14, 2020 [http://network.icom.museum/fileadmin/user\\_upload/minisites/camoc/PDF/Newsletters/Minom\\_02.pdf](http://network.icom.museum/fileadmin/user_upload/minisites/camoc/PDF/Newsletters/Minom_02.pdf).

<sup>6</sup> JANES, Robert R. and SANDELL Richard. *Posterity has arrived: The necessary emergence of museum activism*. In: Robert R. Janes and Richard Sandell (eds.), *Museum Activism*. London and New York: Routledge, 2019, p. 1 and 6.

<sup>7</sup> JANES, SANDELL, *Posterity...*, p. 6.

<sup>8</sup> *Ibidem*, p. 4.

<sup>9</sup> *Ibidem*, pp. 14–17.

intervene to advocate for social justice. He felt that although the museum should be a partner of other institutions working towards this direction, it would be a mistake to abandon the essential mission – to collect and preserve cultural heritage – in order to become, instead, “an agent of change”.<sup>10</sup> He regarded this tendency as risky and beneficial in the short-term at best, resulting in the reduction of other important services that museums provide to their communities.<sup>11</sup> A permanent change requires resources and capabilities that most (especially small) museums do not have. Nor can it be assumed that museum personnel will, in addition to education in history, art history, etc., have the requisite knowledge and competence in psychology, sociology, political science or spatial planning.<sup>12</sup>

Institutional changes needed for the transformation of the historical role of museums from institutions whose job is to gather and preserve artefacts and collections into institutions involved in improving social life are, likewise, not a simple matter. According to Elizabeth Wood and Sarah A. Cole, the main difficulties are: 1) the lack of knowledge of or understanding the needs and situation of a local community; 2) privileged points of view preventing museum professionals from identifying problems that the museum can solve; and 3) the lack of a strong definition of social justice.<sup>13</sup>

With regard to the organisational structure, the basic proposition is to give up corporate management hierarchy – where great authority and responsibility is held by one person (usually the director of the institution) – in exchange for granting increased autonomy to the employees. Museum activism promotes shared authority because it expects museum personnel to be ready to bear moral responsibility for supporting ethical issues, as well as to display flexibility and openness with regard to ways of cooperating with the public that build relationships and strengthen networks outside the museum, thereby supporting broader efforts for change.<sup>14</sup>

Museum personnel also share a widespread conviction that they have to protect their neutrality to avoid falling victim to prejudices, trends and interest groups, and to preserve the authority of the institution. Sometimes the duty of maintaining objectivity is also mentioned. Although faith in the possibility of achieving true objectivity has substantially weakened in recent years, a similar attitude (or at least the act of seeking to achieve it) is still valued, because museum practitioners believe they have the ability to bring museum audiences closer to the truth. They are afraid to lose their credibility by openly advocating a specific standpoint.

It is worth asking at this point what museum neutrality would actually entail. If we look to the dictionary definition and treat neutrality as “an impartial attitude towards other people’s affairs, other people’s disputes, impartiality, indifference”,<sup>15</sup> then it is obvious that no museum is neutral and none could be. Robert Janes regards the conviction about “authoritative neutrality” as a fallacy, while neutrality, he believes, is actually an ideology made up of a set of ideas, judgments and values that justify and conceal the specific interests of some social groups. By identifying themselves as ideologically neutral spaces for debate and representation, museums in actual fact position themselves on the margins, justifying their passivity by the fact that they

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<sup>10</sup> ORLOFF, Chet. Should museums change our mission and become agencies of social justice? In: *Curator: The Museum Journal*, 60(1), 2017, p. 35.

<sup>11</sup> *Ibidem*, p. 36.

<sup>12</sup> *Ibidem*.

<sup>13</sup> WOOD, Elizabeth Wood and COLE, Sarah A. Growing an activist museum professional. In: *Museum activism*, pp. 37–38.

<sup>14</sup> JANES, SANDELL, *Posterity...*, p. 9

<sup>15</sup> SZYMCAK Mieczysław (ed.). *Słownik Języka Polskiego* [Polish Dictionary], Vol. II. Warsaw: PWN, 1988, p. 316.

do not have resources or knowledge to take up new or controversial issues.<sup>16</sup> Concern for the so-called neutrality of museums negates a broader vision of their activity and a chance to achieve their true potential.<sup>17</sup>

Sandra L. Rodegher and Stacey V. Freeman observe that neutrality taking the form of inaction is not only non-neutral but also has negative consequences. Although the intention may be pure, empirical studies show that inactivity is an action that assesses a particular approach to a problem. Out of the possible attitudes museums can adopt, they distinguish three that they term “feigned neutrality, advocacy and activism”. Feigned neutrality involves keeping museum visitors convinced that the museum presents only facts and reports information covering the area of expert knowledge of specific facts. Advocacy involves sharing knowledge and, at the same time, indicating challenges and offering space for reflective dialogue. It is an attempt to answer the question of what can be done in a given case; the museum does not avoid taking a stand on the issues in which it specialises and is able to offer professional expertise. Activism involves raising a problem and showing clear and direct ways of solving it.<sup>18</sup>

It should also be pointed out that with the growing consciousness of global (but also local) threats, social requirements will inevitably change. The broad public may expect all cultural institutions to become involved in the issues crucial to the present. There is also a growing pressure to make it possible to participate in museum activity. To maintain feigned neutrality may prove contrary to society’s expectations of museums.

Discussion of the importance of museums and their influence on society also includes the idea of museums as components of networks or systems that are connected through objects, images and information. Robert Janes speaks of the cluster concept and envisions the “ecology” of museums, which he defines as a wide network of social relationships necessary for enhancing the importance and even survival of these institutions.<sup>19</sup> Looking at the museum as part of a network changes the lens through which we define an organisation. Objects and specific histories are valuable and unique but a network lens shifts the focus to the museum’s social potential. As a museum develops relationships with other network members, it also develops the ability to group together a range of other actors who can support and assist initiatives beyond the reach of individual organisations. The museum’s capacity to connect with a wide range of institutions that share a common subject matter supports and enhances its authority in linking actors whose objectives may seem far removed from the museum’s mission. Ultimately, the museum becomes crucial both to the network and to the development of initiatives aimed at solving complex problems, by pointing to unused resources and seeing capability where others fail to see it.<sup>20</sup>

An example of this is the Leadership Divisions programme conducted by Washington’s Holocaust Museum, addressed to leaders and specialists (including military), law enforcement agencies, the judiciary and students whom the museum defined as persons or institutions with authority and bearing responsibility for preserving and protecting the values of democratic

<sup>16</sup> In the case of American museum, the issue is most often the interests of private sponsors, because museums are increasingly dependent on corporate and private funding. JANES, *Museums in a Troubled World...*, p. 59.

<sup>17</sup> JANES, SANDELL, *Posterity...*, p. 8.

<sup>18</sup> RODEGHER Sandra L. and FREEMAN Stacey Vicario. Advocacy and activism. A framework for sustainability science in museums. In: *Museum Activism*, pp. 341–344.

<sup>19</sup> JANES, *The mindful museum...*, p. 333.

<sup>20</sup> McCANN, Marcy. Activist practice through networks. A case study in museum connections. In: *Museum Activism*, p. 221 and 227.

society. The programmes combine issues central to the Holocaust Museum's mission, contemporary values and challenges and deal with such matters as the role and duties of citizens in a democratic society, the proper use of power, and tensions between the rights of an individual and public security.<sup>21</sup>

My own studies on historical museums in Poland and in Central and Eastern Europe show that museums can no longer be regarded as places that represent the past as it really was; nor can they be perceived as repositories of knowledge in which progressive and cumulative efforts of their personnel add up to a better understanding of the human world and the natural one. They are not privileged places, they do not explain anything because they themselves need explaining: they are social constructs full of action and interaction. Museums create cultural expressions (e.g. exhibitions); they are active in creating knowledge, these creations being, however, a product rather than a discovery.<sup>22</sup> Museums offer opportunities and potential for discovering their own conceptual order, and even for reversing or criticising it: they are institutions capable of reflecting on their status and identity, as well as contesting specific knowledge–authority discourses. They are therefore certainly not places that can be defined by their objects and collections alone. They do not always, however, use their critical potential. Regrettably, they often shape their priorities in accordance with a top-down demand for a particular narrative, become involved in political battles, or confirm the hierarchy of values in a particular historical moment. Poland and other Central and Eastern European countries are still undergoing transformation and analysing the events of the past. The societies of the former Eastern bloc also have greater need for self-identification and the creation of integrative narratives compared to the stabilised Western democracies, hence museum narratives in these countries often focus on filling in the blanks in the recent communist past or commemorating events connected with the struggle to regain full sovereignty.<sup>23</sup>

The elements of museum activism are seldom found in Polish museum practice. Hierarchically managed and traditional (despite a sometimes attractive form of presentation), Polish institutions mostly refuse to expand on their basic mission and become involved in current affairs. There are, however, examples of institutions that are setting new trends in Polish museology. The three cases discussed below are all museums that are concerned with a difficult past whose acceptance is still a challenge to a large part of Polish society even today.

### POLIN Museum of the History of Polish Jews in Warsaw

In 2013, owing to the trilateral agreement between the then Polish government, Warsaw's municipal government and a non-government organisation (Jewish Historical Institute Association), POLIN Museum of the History of Polish Jews was opened. The building, designed by Rainer Mahlamäki and recipient of multiple awards, was erected in the centre of the former Jewish quarter (known as Muranów district today), in which Nazi Germans established a ghetto during World War Two. The permanent narrative exhibition tells the history of the thousand-year-long presence of Jews in Polish territory. The exhibition emphasises the positive elements of the shared Polish–Jewish legacy, but the authors did not omit the difficult and painful issues known to history researchers. Neither the pogroms by nor collaboration of

<sup>21</sup> Ibidem, p. 222.

<sup>22</sup> PEARCE, Susan. *Museums, Objects and Collections: A Cultural Study*. Washington, DC: Smithsonian Institution Press, 1992, p. 258.

<sup>23</sup> ZIĘBIŃSKA-WITEK, Anna. Musealisation of communism, or how to create national identity in historical museums. In: *Muzeologia a Kultúrne Dedičstvo* 8(4), 2020, pp. 59–72.

some members of Polish society with German Nazis during World War Two were “forgotten”. POLIN museum continues to actively respond to current controversial matters.

One example of such activity is the temporary exhibition opened on the 50th anniversary of the March 1968 events. The term “March 1968” refers to a social and political crisis in Poland that began in June 1967, reached its height between 1967 and 1968, and came to an end in late summer 1968. The most important elements of the crisis were acute factional struggle within the ruling Polish United Worker’s Party (PZPR), a social crisis resulting from disappointment with shrinking civil liberties and democracy following the major transformations of 1956, and finally, the use by the authorities of anti-Semitic stereotypes and prejudices, which resulted in the largest anti-Semitic campaign in post-war Europe after the Stalinist purges of the 1950s, and led to the mass emigration of the remainder of Jewish community from Poland.

By using artefacts, pictures, documents and films from the period, the exhibition *Obcy w domu. Wokół marca* (Estranged. March ’68 and Its Aftermath) showed the Jewish experiences of March 1968 and its consequences, especially the forced emigration of thousands of people.<sup>24</sup> In accordance with its intended objectives, the exhibition referred to universal experiences – in this case, the existential fear associated with the loss of the sense of security. A story was presented about the stigmatisation, uprooting and exile experienced by approximately 13,000 Polish Jews who were expelled from their homeland.<sup>25</sup> The exhibition also highlighted the media campaign of hatred that accompanied those dramatic events. It thus produced a critical image of Polish society and a population which was mostly indifferent to acts of aggression directed at their fellow citizens.

From the perspective of the paradigm of museum activism, what is important is that the curators of the exhibition, Justyna Koszarska-Szulc and Natalia Romik, referred to the current political situation and devoted the final part of the exhibition to hate speech in the comments found at the time on Internet portals and in popular right-wing media. A section of the display *Nowomowa i ciąg dalszy* (Newspeak and Continuations) presented titles, headlines and excerpts from texts and tweets published in connection with a current diplomatic conflict between Poland and Israel, in the aftermath of an amendment, forced by the Institute of National Remembrance, to a statute stipulating fines or imprisonment for anyone who attributed “to the Polish nation or Polish state the responsibility or joint responsibility for the crimes committed by the Third Reich”.<sup>26</sup> The exhibition in POLIN Museum allowed the visitors to compare two seemingly different situations that produced similar results. The anti-Semitic comments of 2018 were strikingly similar to those of 50 years ago. The exhibition, by showing the dramatic effects of passivity in the past, confronted the visitor with the present-day problem of the failure to respond to and to combat hate speech. Confronted with the question how a member of civil society should behave in such circumstances, each visitor had to answer it for themselves; the museum, however, took a clear stand, abandoning the stance of feigned neutrality.

A similar subject was reflected in a joint project between POLIN Museum and Józef Piłsudski Museum in Sulejówek. The two institutions invited museum practitioners from all over Poland, as well as individuals interested in cooperating with local communities, to take part in the museum thinktank

<sup>24</sup> STOLA, Dariusz. Pół wieku po marcu. In: Koszarska-Szulc, Justyna and Romik Natalia (eds.), *Obcy w domu. Wokół marca ’68* (exhibition catalog). Warsaw: Muzeum Historii Żydów Polskich, 2018, pp. 8–9.

<sup>25</sup> KOSZARSKA-SZULC, Justyna, ROMIK. *Obcy w domu*. In: *Obcy w domu*, p. 15.

<sup>26</sup> The statute was voted through, but the penalty of imprisonment was eventually rescinded. [www.wprost.pl/swiat/10135410/izraelski-dziennik-polska-wycofuje-sie-z-kontrowersyjnej-ustawy-o-holokaucie-rezygnujac-z-kary-wiezienia.html](http://www.wprost.pl/swiat/10135410/izraelski-dziennik-polska-wycofuje-sie-z-kontrowersyjnej-ustawy-o-holokaucie-rezygnujac-z-kary-wiezienia.html), accessed December 5, 2022.

(established in 2014) devoted to the subject *Muzea i sąsiedztwo* (Museums and Neighbourhood). The project promoted museums' responsibility for their environment, and supported local activities, including activism and intervention. Activities included the temporary installation *Plot nienawiści* (The Fence of Hatred) in Muranów, which presented hate speech and slogans found in the public space of Polish cities, displayed from August to October 2015.<sup>27</sup> On the fence, one could discern slogans such as “*Łowcy Cyganów*” (Gypsy Hunters), “*Jude Raus*” (Jews out! [in German]) and “*Polska dla Polaków*” (Poland for the Poles), but reading them was not simple, because the fence bars were bent so as to make it difficult to decipher the inscriptions. An important role was played by the material from which the installation was made. Hubert Czeropok – the author of the installation – argued that:

to translate hate speech into one of the most difficult-to-machine materials, which is forged steel, is to work over it in a literal, physical way. The inscription so reworked is more durable, and more uncomfortable, more difficult to hide and ignore. That is why an important aspect is the materiality of this work. The installation is standing in the public space, adjacent to the spray inscriptions on the wall. It is thereby more difficult, bitter and embarrassing.<sup>28</sup>

These examples show that POLIN Museum maintains an activist attitude, using both exhibitions for this purpose and activities that are part of the basic, educational and expositional mission of the museum.

### Auschwitz-Birkenau Museum

Two of Poland's most important museums expand their mission with civic activity. Both are memorial sites associated with former German Nazi concentration camps: Auschwitz-Birkenau Museum (in Oświęcim near Krakow) and the State Museum at Majdanek (in Lublin). They were both established in 1947 and have continued uninterrupted in their mission, which is to cultivate the memory of the victims of German Nazi crimes, to protect and conserve the camp relics, and to offer education in the broad sense, aimed at shaping the attitudes of visitors. The two museums, however, treat their mission in broader terms. Their activity goes beyond the representation of a difficult past, aiming at the same time to influence the present.

A clear example of this is the actions of Piotr Cywiński, Director of Auschwitz-Birkenau Museum, in connection with the case of 13-year-old Omar Farouq, who was sentenced to 10 years' imprisonment by a Nigerian Sharia court in September 2020 for blasphemy against Allah. After the verdict was announced, Cywiński wrote to Nigerian President Muhammad Buhari, asking him to pardon the boy. Moreover, he suggested that if granting the pardon proved impossible, he would assemble 120 adult volunteers, each of whom would voluntarily spend one month behind bars instead of the boy, and that he himself would be one of the volunteers. The essential element here is that Piotr Cywiński responded to Omar Farouq's case not as a private individual but as the director of an institution devoted to commemorating the victims of Nazi extermination. “As the director of the memorial site of children who were imprisoned and murdered, I cannot be indifferent to this sentence, which is an affront to humanity,” he

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<sup>27</sup> See: <https://issuu.com/aleksandracybulska/docs/muzealny-thin-tank-muzea-sasiedztwo-3022021> accessed March 3, 2022.

<sup>28</sup> <https://culture.pl/pl/dzielo/hubert-czeropok-plot-nienawisci>, accessed May 1, 2022.

wrote in his letter to the Nigerian president.<sup>29</sup> Thanks to this gesture, the case was widely publicised, with human rights defenders, lawyers, people from Poland and abroad (including Nigeria), and the media becoming involved. Ultimately, a secular court acknowledge that the sentence could not be served because Omar Farouq was underage and because he was not represented by a defence lawyer during the trial by the religious court.<sup>30</sup>

Piotr Cywiński understands the mission of the museum he directs in broader terms than curating the memory of past victims. To him, this memory makes sense only when it involves today's responsibilities. During the commemoration of Auschwitz's 75th anniversary, he noted that

today, almost everywhere, one can see old ghosts coming back to life. [...] Anti-Semitism, racism, xenophobia are growing [...] in the gloom of re-emerging populism and demagoguery the ideologies of contempt and hatred are growing stronger, [while] we [...] are becoming increasingly indifferent, withdrawn, apathetic, and passive [...]. After the Holocaust our silence today is our heavy defeat, our own dehumanisation. Yes, precisely: self-dehumanisation.<sup>31</sup>

Another example is the international competition *Moja pamięć, moja odpowiedzialność. W moim miejscu* (My Memory, My Responsibility. At My Place) announced on February 14, 2022 to support socially-engaged attitudes and actions on a local level. The competition invites project proposals that refer to the history of Auschwitz, but also concern the present.<sup>32</sup>

The activity of the Auschwitz-Birkenau Museum is thus not limited to preserving a difficult legacy: it also fosters the creation of civic attitudes at a local and global level.

## The State Museum at Majdanek

The State Museum at Majdanek has expanded its traditional mission in a similar way. The institution recently began cooperating with the uniformed services in the Lublin region.<sup>33</sup> From 2015, in partnership with the Provincial Police Headquarters in Lublin, it has been organising historical–educational seminars devoted to the subject of the perpetrators of crimes during World War Two. The first group to take part in the workshop *Sprawcy z obozu na Majdanku. Zwyczajni ludzie czy fanatyczni mordercy?* (Perpetrators from the Majdanek Camp. Ordinary People or Fanatical Murderers?) were human-rights leaders and press officers of Lublin Province's police garrison. The participants learned about the history of the concentration camp in Lublin, broadening their knowledge of the psychology of the perpetrators and the crimes committed for ideological, racist and xenophobic reasons. The discussion on the question of why ordinary people perpetrate mass murders pertained not only to historical subjects but also to current issues connected with offences motivated by hate speech and contemporary racism.

<sup>29</sup> WANTUCH, Dominika, *Proponował, że odsiedzi wyrok za 13-latkę. Dyrektor Muzeum Auschwitz uratował chłopca przed nigeryjskim więzieniem*, <https://krakow.wyborcza.pl/krakow/7,44425,26712528,proponowal-ze-odsiedzi-wyrok-za-13-latka-dyrektor-muzeum-auschwitz.html>, accessed February 2, 2022

<sup>30</sup> Ibidem.

<sup>31</sup> SENKOWSKA, Nadia, SZAFRAŃSKI, Marek. *Piotr Cywiński: gorsza od zapomnienia jest pamięć, która nie rozbudza moralnego niepokoju*. <https://dzieje.pl/aktualnosci/piotr-cywiniski-gorsza-od-zapomnienia-jest-pamiec-ktora-nie-rozbudza-moralnego-niepokoju> accessed February 2, 2022.

<sup>32</sup> <https://www.auschwitz.org/muzeum/aktualnosci/miedzynarodowy-konkurs-moja-pamiec-moja-odpowiedzialnosc-w-moim-miejscu-2277.html> accessed February 4, 2022.

<sup>33</sup> Review with Jolanta Laskowska, Head of Education Department of the Majdanek Museum, conducted on April 2, 2022.



Educational classes on the perpetrators offered by the State Museum at Majdanek were also an opportunity to reflect on modern crime prevention and the prevention of hate crimes.

The following year (2016), similar educational classes were held for police officers of Lublin Province garrison, including those from criminal investigation departments. As part of the programme, they visited Majdanek Museum, explored historical exhibitions, and learned about the fates of the Nazis' victims, based on video accounts. The focus of interest was analysing the biographies of perpetrators from the former Majdanek concentration camp in their historical, social and psychological context. The participants anonymously shared their reflections:

“This type of training is valuable because it shows how easy it is to go beyond the limits of our own behaviour.”

“Very good training. It made me think a lot about my conduct.”

“Interesting classes; they allowed me to look at my work from a different perspective.”

“A useful meeting, mainly to reflect on my own decisions and my approach to other people.”

“The classes directly made me realise how particular individuals may behave under the influence of ideology, propaganda, and the sense of impunity.”

These remarks prove that the participants easily associated the historical content with their own professional experience.

Somewhat different remarks were expressed in 2019 by participants in the same workshop, held as part of a one-day study visit by legal trainees, judges and prosecutors from Italy, Greece, the Netherlands, Romania and Germany – members of the European Judicial Training Network AIACOS and the National School of the Judiciary and Public Prosecution in Krakow and Lublin. In this case the participants expressed reflections from a more universal perspective:

“We have to protect human rights and never stop defending freedom and equality.”

“Every single person can make a difference: the importance of being autonomous and human.”

“Remind yourself everyday to fight the beast in you and to water the flowers you carry in you instead.”

“I think it was also the conclusion of the workshop – a critical mirror was given to us...”

“I cannot accept the fact that human beings did these things to other human beings; I am afraid to understand the reason.”<sup>34</sup>

In 2017 the State Museum at Majdanek entered into an agreement with the Regional Inspectorate of Prison Service (OISW) in Lublin to cultivate the memory of and develop historical education about German occupation in the Lublin Region among Prison Service personnel and prisoners. The museum conducted training and education activities aimed at Prison Service officers and civil servants, as well as selected groups of prisoners. As part of the agreement, meetings, exhibitions, lectures and other initiatives were organised for prisoners who, having acquired historical knowledge about World War Two, were encouraged to develop empathic attitudes supporting the process of social reintegration. Educational workshops and classes were also organised for the inmates of the Opole Lubelskie Penitentiary. The first course, *Historia ukryta w fotografii* (History Hidden in Photographs), was held in 2017. The aim of the joint program developed by museologists and the Prison Service was to shape moral and social attitudes in prisoners by teaching them about the history of Majdanek. The educational classes were based on the exhibition *Majdanek w fotografii Edwarda Hartwiga* (Majdanek as Photographed

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<sup>34</sup> I am grateful to Jolanta Laskowska, Head of Education Department of the Majdanek Museum, for making the materials available to me.

by Edward Hartwiga) and were attended by 30 inmates. The workshop began by presenting the documentary *Majdanek. Obóz koncentracyjny w Lublinie* (Majdanek. A Concentration Camp in Lublin). The historical narrative of the former Majdanek concentration camp was told through black-and-white photographs taken by the famous photographer Edward Hartwig at the site of the museum. These works generated many questions about the past and reflections on the present among participants.

In 2019, a group of prisoners took part in another workshop on history presented through the graphic novel *Chleb wolności* (Freedom Bread). The modern and unconventional source, published by the Majdanek Museum's Publishing Department, familiarised participants with the history of the former concentration camp at Majdanek and of the people incarcerated there. The pictures enabled them to engage more deeply with that difficult past and the struggle of the victims who were trying to survive and preserve their dignity – and also with those whose dignity and humanity was crushed by the Nazi Regime. In addition to imparting knowledge, the diverse subject matter covered in the classes for prisoners aimed at encouraging self-reflection and invited participants to ponder present day analogies and their own choices.

## Conclusions

All three examples considered here – POLIN Museum, Auschwitz-Birkenau Museum, and the State Museum at Majdanek – illustrate the institution's systemic thinking. All three museums accept that they do not operate in a vacuum but exist within the broader social, cultural and political environment. Being open to these environments makes the museum more significant – it does not focus on itself but becomes inclusive and participatory.<sup>35</sup> The projects undertaken in collaboration with other institutions combine the history represented by each specific museum with the present-day challenges facing the community. In this way, each of these projects implements the principles of museum activism.

The term “activism” is semantically burdened, associated with energetic or even intense actions aimed at change. However, as the foregoing examples show, activism can be understood in a broader context as striving for change, making an effort to promote reform or, at least, demonstrating a desire to introduce improvements in various social spheres.<sup>36</sup> They show us that activism – seen as striving for positive improvements in society – does not require revolutionary transformations in the traditional mission of the museum, but simply the competent use of museums' existing cultural capital.

The need for change is not a new situation for museums. Institutions connected with diverse forms of rationality and power, as well as with popular culture, have evolved over recent centuries from elitist collections evidencing the dominance of imperial rulers and nation-states, through educational institutions for the general public, to spaces of multi-sensory experience – a form of entertainment for the consumer society.<sup>37</sup> The current museum boom is the result of sociocultural changes brought by capitalism, such as the emergence of mass tourism, an increased amount of free time, the development of the consumer society, and the postmodern disruption of boundaries between high and low culture. Museums have become symbols of cultural and economic revitalisation; they are institutional symbols of cities and regions,

<sup>35</sup> JUNG, Yuha, LOVE, Ann Rowson. Systems thinking and museum ecosystem. In: JUNG, Yuha, LOVE, Ann Rowson (eds.), *Systems Thinking in Museums: Theory and Practice*. Lanham: Rowman and Littlefield, 2017, p. 9.

<sup>36</sup> VLACHOU, Maria. Dividing issues and mission-driven activism. Museum responses to migration policies and the refugee crisis. In: *Museum Activism*, pp. 49–50.

<sup>37</sup> See: WITCOMB, Andrea. *Re-Imagining the Museum: Beyond the Mausoleum*. London and New York: Routledge, 2003.

enhancing their image and attracting tourists.<sup>38</sup> Although they have never abandoned their mission of civic education, at present many museums are finding this more difficult to fulfil as they become increasingly dependent upon economic liberalism and its basis of consumption and pleasure.

However, we live in times of global threats, and the capitalist story of economic growth and free markets is beginning to crumble. Museum activism responds to the need for a new narrative based on the foundation of sustainability. Arguably, never more than now have we needed to realise the potential of museums as social and civic institutions.

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<sup>38</sup> For one of the harshest opinions on the entertainment dimension of museum institutions see: CLAIR, Jean, *Kryzys muzeów. Globalizacja kultury*, (trans from French by Jan Kloczkowski). Gdańsk: słowo/obraz terytoria, 2009.

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# The new approach to commemorating open-air war sites on the example of the Museum of Westerplatte and the 1939 war in Gdańsk, Poland

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*The new approach to commemorating open-air war sites on the example of the Museum of Westerplatte and the 1939 war in Gdańsk, Poland*

This paper focuses on current issues in the development of open-air memorial sites. The concept of open-air museums is evolving in the twenty-first century to encompass sustainable protection of war monuments in their historical context. The cultural landscapes require minimal intervention. However, to ensure the viability of the museums and accessibility to visitors, new additions – in terms of architecture and urban design – are inevitable. The challenge is to guarantee the quality and coherence of any additions and to preserve historic landscapes. It is also crucial to ensure public acceptance of revitalization efforts. Open architectural competition might be a reliable means of delivering viable results, as demonstrated by the recent construction of a new military cemetery and restoration of the battlefield in Westerplatte in Gdańsk, Poland.

Keywords: open-air museums, battlefields, architecture, Westerplatte, Poland

## Introduction

Commemorating open-air war sites is a challenge. There are numerous issues encompassing accessibility, preservation of original tissue, architectural and urban planning, educational services and social acceptance, among others. Open-air museums, regardless of their specialty, must have some key attributes. They should present historical buildings within their authentic environment, for example, surrounded by fields or forest. If possible, they should retain the original spatial relations between the buildings and within their environment.<sup>1</sup> Moreover, they should present the buildings' interiors, thus demonstrating how they could have been used. Preservation of original spatial relations emphasises the authenticity of the place and enhances the visitor experience.<sup>2</sup> Cultural landscapes require only minimal intervention to exhibit the background of historic events. However, in the case of Second World War battlefields, in order to ensure the integrity of perception, one might inevitably have to resort to integral

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<sup>1</sup> RYCHNOVÁ, Lucie et al. Open-air Museums – the Future of the Presentation of Spiritual and Architectural Heritage, *Muzeologia a kultúrne dedičstvo*, 2022, vol. 10, Is. 1, pp. 5-18, DOI: 10.46284/mkd.2022.10.1.

<sup>2</sup> ŻOŁNIERCZUK, Maciej. Conditions for planning the space around the museum in the open-air. Uwarunkowania planowania przestrzeni wokół muzeum na świeżym powietrzu. In: BARAŃSKA K., MURZYN-KUPISZ M., ŚWIĘCHA J. (eds.). *Muzea na wolnym powietrzu. Antycypacje. Muzeum Kultury Ludowej w Kolbuszowej*, 2020.

restoration and (partial) reconstruction.<sup>3</sup> It is advisable to use the concept of veracity based on comprehensive documentation, but with a clear intention not to present the reconstructed monument as authentic, accordingly to the Nara Document on Authenticity.<sup>4</sup>

There are two major concepts for the development of open-air museums currently in use. The first concept relies on preservation and presentation of monuments in their original context at the historic site. The second approach allows for extraction from the original site and reconstruction in a new place which reflects the original context as much as possible.<sup>5</sup> The first concept is used when it comes to battlefields. The authenticity of the environment is the greatest advantage, although the site's seasonal nature, spatial isolation from inhabited areas and lack of basic services may be inconvenient. To turn the battlefield site into an open-air museum, certain functions must be provided, for example, tourist services, restrooms, parking space, public transport stops, gathering areas, conference rooms, museum shops, cafeterias, etc. Moreover, the proper functioning of any museum requires offices, spaces for scientific research, technical rooms, and so on.<sup>6</sup> These functions generate certain architectural and urban planning demands which may damage the original environment of the historic site. The presence of new buildings can diminish the harmony of the site, therefore they should be located some distance from any protected areas.

The main questions centre around how to ensure the quality and coherence of new additions, preserve the historic landscape, and elicit public acceptance of any revitalization efforts. Even though cultural and natural assets, as well as their collective memory, are entrusted to the nation state and its museums, decisions concerning the preservation of cultural heritage are oftentimes not made by national governments but in the volatile forum of public opinion.<sup>7</sup> According to the Resolution on the Responsibility of Museums towards Landscapes adopted by the ICOM General Assembly in 2016, museums should extend their mission to protect cultural heritage in close relationship with communities.<sup>8,9</sup> Museums are like landscapes: they are made up of complex relations between people, spaces, artefacts, physical evidence and symbols.<sup>10</sup> Thus, social acceptance and the collective memory are given top priority in the development of sites of cultural heritage. Today, as the traditional canon of knowledge about the past is losing its implicit value, people interpret reality as a series of correlated experiences

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<sup>3</sup> BRYCH, Mariia. General approaches to spatial formation of open-air museums exhibition. In: *Przestrzeń i Forma: kwartalnik naukowo-dydaktyczny*, no. 43, 2020, pp. 113–122.

<sup>4</sup> Nara Document on Authenticity, UNESCO, 1994, <https://www.icomos.org/charters/nara-e.pdf>, access 22.04.2023

<sup>5</sup> RYCHNOVÁ, Lucie et al. Open-air Museums...

<sup>6</sup> BRYCH, Mariia. Peculiarities of memorial open-air museums space formation. In: *Przestrzeń i Forma: kwartalnik naukowo-dydaktyczny*, no. 37, 2019, pp. 137–146.

<sup>7</sup> MAJEWSKI, Piotr. Planning a museum in its surroundings, i.e., museum in context-introductory reflexions. In: *Museums and Identities. Planning an Extended Museum*. Volume 20 of the MUZEOLOGIA publishing series issued by the Museum of King Jan III's Palace at Wilanów, Warsaw, 2019.

<sup>8</sup> Resolution No.1: The Responsibilities of Museums Towards Landscape. 31st General Assembly of ICOM. Milan, Italy, 2016. [https://icom.museum/wp-content/uploads/2018/07/ICOMs-Resolutions\\_2016\\_Eng.pdf](https://icom.museum/wp-content/uploads/2018/07/ICOMs-Resolutions_2016_Eng.pdf), (accessed 29 August 2023).

<sup>9</sup> FOLGA-JANUSZEWSKA, Dorota. *Muzeum: Fenomeny i problemy*, TAIWPN Universitas, Kraków, 2015.

<sup>10</sup> GARLANDINI, Alberto. New Museums for New Social Challenges. "Extended museums" facing UNESCO's 2015 recommendations on museums and ICOM's 2016 resolution on the responsibility of museums towards landscapes. In: FOLGA-JANUSZEWSKA D. (ed.) *Extended Museum in its milieu*. Volume 18 of the MUZEOLOGIA publishing series issued by Universitas, National Committee ICOM Poland and the Museum of King Jan III's Palace at Wilanów, 2017.

rather than ephemeral incidents.<sup>11</sup> In order to appropriate the cultural landscape, people need to experience it as meaningful.<sup>12</sup> Military sites convey a relationship with historic identity. The landscape of a battlefield is experienced through meaningful bonds to historic events, and as the actual location of events that hold an important place in the collective memory. The visual aspects are as important as the ambience and feelings that they convey. Visitors who have learned about a historical event during their formal education have a chance to experience it by visiting the place in which it happened. Any alterations, expansions and additions to historic sites are thus subject to collective judgement.

For these reasons, open architectural competitions, attracting multiple teams and delivering numerous options, might be a reasonable solution.

### Architectural and urban design competitions

The International Union of Architects states that “Architectural competitions are a quality-based and solution-oriented selection procedure for architectural services, the best way to achieve quality in the built environment”.<sup>13</sup>

Modern architectural competitions, first used over 150 years ago, can be regarded as a trustworthy practice.<sup>14</sup> The competition is an instrument of architectural politics representing both a social order and professional practice. The key is confidence in the rational judgement of the competition’s jury and participants’ capacity to generate good solutions. There are various types of competition used for different contracts: open competitions, limited competitions and invited competitions.<sup>15</sup>

An open competition is an international competition that can be entered by any registered architect. The organizers seek the broadest possible range of ideas and want international exposure for the project.<sup>16</sup> An open competition may occur in one or two stages. One-stage architectural competitions are open to all registered architects. Two-stage architectural competition narrow the number of invited architects after a preliminary first stage. A limited competition narrows the number of registered architects. In most cases the organizer restricts entry to professionals from a common geographic, cultural, historical or economic background.<sup>17</sup> An invited competition limits the number of registered architects to specific group chosen by the organizer, usually three to five entrants. The organizer covers the cost of their work.<sup>18</sup>

Modern architectural competitions are organized to create spectacular architectural forms that attract interest and visitors.<sup>19</sup> However, in the case of the open-air military museums, social aspects and the acceptance of results that have been delivered via an egalitarian competition seem to be the most important benefits.

<sup>11</sup> MAJEWSKI, Piotr. Planning a museum...

<sup>12</sup> NORBERG-SCHULZ, Christian. *Genius loci: Towards a Phenomenology of Architecture*. New York: Rizzoli, 1979.

<sup>13</sup> See IUIA, INTERNATIONAL UNION OF ARCHITECTS, INTERNATIONAL COMPETITIONS COMMISSION, Guidelines UIA competition guide for design competitions in architecture and related fields interpreting and implementing the UNESCO “Standard Regulations for International Competitions in Architecture and Town-Planning”, 2020.

<sup>14</sup> ANDERSSON Jonas, BLOXHAM Gerd, RÖNN Magnus. *Architectural Competitions: As Institution and Process*, Royal Institute of Technology, Kungl. Tekniska högskolan, Rio kulturkooperativ, Stockholm, 2016.

<sup>15</sup> See: <https://raic.org/raic/competition-methods> (accessed May 1, 2023).

<sup>16</sup> See: <https://raic.org/raic/competition-methods> (accessed May 1, 2023).

<sup>17</sup> IUIA, INTERNATIONAL UNION...

<sup>18</sup> Ibidem.

<sup>19</sup> ANDERSSON, Jonas; BLOXHAM, Gherd; RÖNN, Magnus. *Architectural Competitions...*



## Authenticity or the veracity of reconstruction?

Authenticity is a recurring notion in the contemporary conservation of cultural heritage. It is a philosophical issue related to the search for meaning and the concept of truth.<sup>20</sup> The question might be what is more relevant: to preserve the authentic relics of the battlefield or to promote intangible understanding of the battle, allowing for reconstruction and reenactment? What is more important: the authenticity of relics that can be objectively determined by experts according to set standards or the veracity of the constructed interpretation of observable things? It all depends on the attitude towards cultural heritage. If it is regarded as a process defined by intangibility, reproducibility is acceptable.

Battlefields represent sites of memory; they are associative cultural landscapes described by UNESCO as places with powerful religious, artistic or cultural associations that are more important than material cultural evidence.<sup>21</sup> Thus the priority for an open-air battlefield museum is to discover, restore and reproduce the monuments, because the most important aspect is the immaterial memory of historic events.

## The Westerplatte in Gdańsk, Poland

The peninsula of Westerplatte is one of the most recognizable Second World War sites. It is the place where the conflict began on 1 September 1939. Before that day, the peninsula had withstood a series of environmental, urban and military transformations over the 300 years since its formation.<sup>22</sup> It is a sandbar at the mouth of the Vistula River, created by the forces of nature in the seventeenth century. From the very beginning its sandy beaches attracted numerous visitors and the peninsula was transformed into a beach resort that functioned until the end of the First World War. At the same time, the peninsula's strategic location led to a military presence. The remains of entrenchments from the second half of the eighteenth century and mid-nineteenth centuries are still visible.

After the First World War, Gdańsk was declared the Free City of Gdansk. In 1924, the League of Nations assigned the peninsula to Poland, allowing for the construction of a military transit depot. The military area was closed to the public. In the face of the growing power of German Nazis in the Free City of Gdańsk, the Polish military authorities decided to build guardhouses and barracks on the Westerplatte Peninsula. The system rested on three lines of defence. The outer line included entrenched outposts and supporting positions. The second line consisted of five guardhouses (numbered I to V) which formed a ring in the centre of the depot. These guardhouses had reinforced concrete shelters in their basements. The final defence comprised the new barracks inside that ring (Guardhouse VI).<sup>23</sup>

On August 25th, 1939 the German training battleship *Schleswig-Holstein* entered the port of Gdansk, supposedly for a courtesy visit. Before sunrise on Friday 1 September 1939, the

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<sup>20</sup> NAKONIECZNA, Elżbieta & SZCZEPAŃSKI, Jakub. Authenticity of cultural heritage vis-à-vis heritage reproducibility and intangibility: from conservation philosophy to practice. *International Journal of Cultural Policy*, 2023, pp. 1-18. <https://doi.org/10.1080/10286632.2023.2177642>.

<sup>21</sup> UNESCO World Heritage Convention, Cultural Landscapes, <https://whc.unesco.org/en/culturallandscape/> (accessed 23 April 2023).

<sup>22</sup> SAMÓL, Wojciech et al. Where the Second World War in Europe broke out: the landscape history of Westerplatte, Gdańsk/Danzig. In: *Land* 2023, 12(3), 596; <https://doi.org/10.3390/land12030596>.

<sup>23</sup> See EXHIBITION ON WESTERPLATTE, <https://muzeum1939.pl/en/exhibition-westerplatte/845.html>, see also website administered by the National Institute of Cultural Heritage <https://zabytek.pl/en/obiekty/gdansk-pole-bitwy-na-westerplatte-111> (accessed 22 April, 2023).

Polish military depot was attacked by the open fire from the battleship, which was moored in the harbour canal. Numerous attacks from all sides of the peninsula followed. However, the most devastating was the attack by Stukas diving bombers which completely destroyed the Guardhouse V, killing its entire crew. Nevertheless, the garrison at Westerplatte, largely outnumbered by the German Nazi forces, heroically defended the peninsula for seven days. Even though the battle for Westerplatte did not influence the fate of the war in 1939, the heroic defence of the peninsula was of great importance for the Polish nation.<sup>24</sup>

#### Westerplatte after the Second World War

The defenders of the Westerplatte tried to preserve the identity of that place after the war and returned each year to commemorate their fallen companions. In September 1946, the first cemetery was established by Captain Franciszek Dąbrowski. The burial place became the first monument on the battlefield.<sup>25</sup>

The communist government turned the defence of the Westerplatte peninsula into a propaganda tool. Although it was a symbol, many relics associated with the military transit depot were neglected and destroyed during the earthworks and construction works for the new harbour canal.

The first competition for the architectural, urban, and artistic development of the Westerplatte area was organized in the 1960s. The project was awarded to the team of Franciszek Duszenko (sculpture), Adam Haup (architecture), and Henryk Kitowski (architecture).<sup>26</sup> As a result of this competition, in 1966, a 25 m monument, *The Defenders of the Coast*, was erected on the peninsula (Figures 1 and 2).



**Fig. 1 and 2:** Photograph of 25 m monument, *The Defenders of the Coast*, resulting from the first competition for the architectural, urban and artistic development of the Westerplatte area organized in the 1960s. Franciszek Duszenko (sculpture), Adam Haup and Henryk Kitowski (architecture). Photographs by the author, 2023.

Its irregular shape was intended to evoke a jagged bayonet stuck in the ground. It is located on a mound constructed from earth excavated during the widening of the port canal. The largescale monument, visible from all sides, dominates the surroundings, thus making any other

<sup>24</sup> See KUCZMA F., SZEJKO K., TUREK W., *Westerplatte – symbol, historia i pamięć*. In: NAWROCKI K. et al. (eds.) *World Battlefield Museums Forum/ Światowe Forum Muzeów Pól Bitewnych*, Wydawnictwo Muzeum II Wojny Światowej w Gdańsku, Gdańsk, 2019.

<sup>25</sup> BRYCH, Mariia. Peculiarities of memorial...

<sup>26</sup> See In memoriam, Pamięci architektów polskich: [https://www.archimemory.pl/pokaz/adam\\_haupt,664](https://www.archimemory.pl/pokaz/adam_haupt,664), accessed 2023.04.25. The design team also included Zbigniew Erszkowski, Czesław Gajda, Józef Galica, Stanisław Radwański, Piotr Solecki and Zbigniew Zabrocki.

functions redundant. Its large scale and the unity of architectural and sculptural design gives the monument impact.<sup>27</sup> However, historic errors committed during the design of the monument have attracted criticism more recently.

In the same year, 1966, Guardhouse I had to be moved a few dozen metres deeper into the peninsula, as its original location was affected by the widening of the canal.<sup>28</sup> Thanks to this technically complex operation, the Guardhouse was saved from destruction. In 1980, Guardhouse I become part of the Museum of Gdańsk.<sup>29</sup>

The Westerplatte battlefield was declared a monument of history by regulation of the President of the Republic of Poland on 22 August 2003.<sup>30</sup> In 2008, the Museum of Westerplatte in Gdańsk was officially created.<sup>31</sup> The first plans for an open-air museum were created by Igor Strzok, who was responsible for the preservation and restoration of historic monuments in the Pomorskie voivodship. His proposal included the reconstruction of fortifications and a few buildings in their exact location, and assigning them new functions such as ticket offices, exposition spaces, and so on.

On 1 September 2009, the outdoor exhibition *Westerplatte: A spa – a bastion – a symbol* was unveiled (Figures 3 and 4).<sup>32</sup> In 2011, an educational path guiding visitors along some of the most important relics was opened to the public.<sup>33,34</sup> The scope of the outdoor exhibition was limited by its nature and did not furnish all possible answers to visitors. Although it was regarded as a useful guide for tourists,<sup>35</sup> there were some critical voices expressing how much important information was missing.<sup>36</sup>

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<sup>27</sup> GĘBCZYŃSKA-JANOWICZ, Agnieszka. *Polskie założenia pomnikowe – rola architektury w tworzeniu miejsc pamięci od połowy XX wieku*. Wydawnictwo Naukowe Neriton, Warszawa, 2010.

<sup>28</sup> See the photographic documentation of how Guardhouse I was transferred to its current location: <http://www.tomek.strony.u.g.edu.pl/wartownia/> (accessed 22 April, 2023)

<sup>29</sup> See the folder of the exhibition WESTERPLATTE IN SEARCH OF AUTHENTICITY organized by the Museum of Gdańsk in 2018 – the proposals for “A Study of the options of developing the battlefield of Westerplatte to restore its historic values and develop the museum functions”, Muzeum Gdańska, See also EXHIBITION ON WESTERPLATTE, <https://muzeum1939.pl/en/exhibition-westerplatte/845.html>, (accessed 22 April 2023)

<sup>30</sup> Rozporządzenie Prezydenta Rzeczypospolitej Polskiej z dnia 22 sierpnia 2003 r. w sprawie uznania za pomnik historii “Pole Bitwy na Westerplatte”, położone w Gdańsku, w województwie pomorskim, See website administered by the National Institute of Cultural Heritage <https://zabytek.pl/pl/obiekty/gdansk-pole-bitwy-na-westerplatte-111>, documents and map <https://zabytek.pl/pl/obiekty/gdansk-pole-bitwy-na-westerplatte-111/dokumenty/PL.1.9.ZIPOZ.NID.N.22.DK.6106/3> (accessed 22 April 2023).

<sup>31</sup> Zarządzeniem nr 29 Ministra Kultury i Dziedzictwa Narodowego z 1.09.2008, See Dura M. (2012) Westerplatte jeszcze się broni. Gdańska Strefa, [www.armia24.pl](http://www.armia24.pl), <https://www.gdanskstrefa.com/wp-content/uploads/2019/05/Armia-Westerplatte.pdf> (accessed 22 April 2023).

<sup>32</sup> See EXHIBITION ON WESTERPLATTE, *Westerplatte: A spa – a bastion – a symbol*, <https://muzeum1939.pl/en/exhibition-westerplatte/845.html> (accessed 22 April 2023).

<sup>33</sup> The concept of the educational path was created by Jan Szkudliński. See: Szkudliński J. Jak powstała ścieżka edukacyjna na Westerplatte, Portal Miasta Gdańska, 2019, <https://www.gdansk.pl/historia-gdanska/historie-gdanskie/jak-powstala-sciezka-edukacyjna-na-westerplatte,a,159558> (accessed 23 April 2023).

<sup>34</sup> The outdoor exhibition was designed by design team: Anna Grabowska, Zbigniew Dalecki, Mateusz Misztal & Dorota Terlecka and the educational path by: Mateusz Misztal, Dorota Terlecka, See the webpage of biuro kreacja: <https://biuro-kreacja.pl/project/wystawa-oraz-sciezka-edukacyjna-westerplatte/> (accessed 23 April 2023).

<sup>35</sup> Męczykowski Ł. Spacerem po Westerplatte, Pierwszy polski portal historyczny, 2012, <https://histmag.org/Spacerem-po-Westerplatte-6764/> (accessed 23 April, 2023).

<sup>36</sup> Dura M. Westerplatte jeszcze się broni. Gdańska Strefa, 2012, [www.armia24.pl](http://www.armia24.pl), <https://www.gdanskstrefa.com/wp-content/uploads/2019/05/Armia-Westerplatte.pdf> (accessed 23 April, 2023)



**Fig. 3 and 4:** Photographs of the outdoor exhibition *Westerplatte: A spa – a bastion – a symbol*. In the background, the harbour canal, port infrastructure and historic buildings of the New Port in Gdańsk which witnessed the battle can be seen.



**Fig. 5:** The educational path table next to the ruins of new caserns. In the background are temporary stands selling souvenirs.

In 2018, Museum of Gdańsk invited three architectural offices from Gdańsk to prepare “a study of the options for developing the battlefield of Westerplatte to restore its historic values and develop the museum’s functions”.<sup>37</sup> The projects were presented during the exhibition

<sup>37</sup> Three architectural offices from Gdańsk were invited to present a proposal: 1. Proconcept. Pracownia Architektoniczna. Marcin Kaniewski z zespołem; 2. Restudio sp. z o.o. Rafal Jacaszek z zespołem; and 3. Wojciech Targowski – Fort Targowski sp. z o.o., Wojciech Targowski z zespołem. See the folder of the exhibition *Westerplatte in Search of Authenticity*, organized by the Museum of Gdańsk in 2018, presenting the proposals for “A Study of the options of developing the battlefield of Westerplatte to restore its historic values and develop the museum functions”, Muzeum Gdańska,



*Westerplatte in search of authenticity*, organized by the Museum of Gdańsk in the same year. All three projects proposed a new parking space, a public transport stop, and a pavilion with tourist services – all away from the remains of the battlefield area. Various means of artistic and architectural expression were proposed to recreate the atmosphere of the historic place using lights, reflective and printed glass, and a partial reconstruction of historic buildings.

In the meantime, from 2016, the first regular archaeological research was undertaken. So far, (at the time of writing in 2023) more than 60,000 artefacts have been recovered. There are plans to put them on display in a new exhibition space. The most significant of all discoveries was the remains of nine Polish defenders, found in 2019.<sup>38</sup> Thus a new cemetery was needed as a place of remembrance, near their original burial place.

On 19 July 2019, the Sejm of the Republic of Poland passed the Act on Investments in construction of the Museum of Westerplatte and the War of 1939 – a branch of the Museum of the Second World War in Gdańsk (Journal of Laws of 2021, item 1280), and established the Museum of the Second World War as the investor responsible for the implementation of this task. “The mission of the Museum of Westerplatte and the War of 1939 is to preserve the authenticity of the battlefield, to keep alive the memory of the Poles’ defiance during World War II, and to preserve the site where the most tragic conflict in history began”.<sup>39</sup>

The new investment was planned in three stages.<sup>40</sup> The first stage (2022) encompassed the modernization of the former power plant, reconstruction of the military cemetery, and revitalization of the relics of the Guardhouse V and the officers’ villa. The second stage (2024) included partial reconstruction of the “Fort” outpost, selected ammunition warehouses, the train station building and the red bordering wall. The third stage (2026) will include construction of a new museum building; conservation repairs to the barracks and Guardhouse III; and the revitalization of relics from the non-commissioned officers’ wardroom, the administration building, and the old barracks. It was decided to organize architectural competitions in order to secure best results.

## Modern architectural and urban design competitions for Westerplatte

In 2020, the Museum of the Second World War announced an international competition for the development of the “Concept of the Military Cemetery of the Polish Army Soldiers in Westerplatte”. It was a one-stage, open, implementation-oriented architectural and urban design competition.<sup>41</sup>

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<sup>38</sup> Dziewanowski, Adam; Kuczma Filip; Samól, Wojciech. Badania archeologiczne pola bitwy na Westerplatte. Wyniki prac prowadzonych w latach 2016-2017 In: Młik H., Węglińska W. (ed.): *Materiałne pozostałości konfliktów i zbrodni XX wieku w świetle najnowszych badań archeologicznych*, 2019, Gdańsk, Muzeum II Wojny Światowej w Gdańsku, 2019, pp.235-275. Wójtowicz-Podhorski, Mariusz. Podsumowanie V etapu prac archeologicznych na Westerplatte, Odkrywca, 2019, <https://odkrywca.pl/podsumowanie-v-etapu-prac-archeologicznych-na-westerplatte-2019/> (accessed 23 April 2023). See webpage of the Museum of the Second World War: IX etap badań archeologicznych, available online: <https://muzeum1939.pl/ix-etap-badan-archeologicznych/aktualnosci/5712.html/> (accessed 23 April 2023).

<sup>39</sup> See webpage of the Museum of the Second World War: Competition for the conceptual design of the Museum of Westerplatte and War of 1939, See <https://muzeum1939.pl/en/competition-conceptual-design-museum-westerplatte-and-war-1939/5888.html> (accessed 23 April 2023).

<sup>40</sup> See webpage administered by the Ministry of Sport and Tourism: Budowa Muzeum Westerplatte i Wojny 1939 – założenia programowe: <https://www.gov.pl/web/sport/budowa-muzeum-westerplatte-i-wojny-1939--zalozenia-programowe> (accessed 23 April 2023).

<sup>41</sup> See: <https://muzeum1939.pl/en/competition-westerplatte-cemetery-concept/about-competition> (accessed 1 May 2023).

Twenty seven projects were submitted to the competition. Three awards, two mentions and five honorary mentions were given.<sup>42</sup> The competition was won by architects from NM architekci Tomasz Marciniwicz, Zuzanna Szpocińska, Jerzy Grochulski and Karolina Kayzer.<sup>43</sup> The winning project was distinguished by its minimalistic design and the use of classic symbols and was judged by the jury to be the most appropriate way to commemorate the fallen defenders of Westerplatte.

The winning design was based on the universal archetype of a symmetrical design. The central route leads to the Virtuti Militari Cross, encircled by a path of commemorative stalls with remembrance plaques.<sup>44</sup> The architectural and urban design of the cemetery allows the cultural landscape and the natural environment to speak by placing manmade constructions in the background. The design also includes the reconstruction of part of the historic communication route from 1939 and reconstruction of the fragmented ruins of the Officers' Villa and Guardhouse V. The bomb crater, located in the northeastern corner of Guardhouse V, a symbol of the tragic air attack on 2 September 1939, has been restored to make it legible and marked with decorative grass. Official ceremonies and funerals were organized at the new cemetery in November 2022.

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<sup>42</sup> Second award: Piotr Pasierbiński, Kraków i Duc Ngo, Tokio, Third award: Andrzej Solyga, Marek Kuciński, Paweł Mysera. Honorary mentions: Marcin Galas Autografstudio; Restudio Jacaszek Architekci Sp. z o.o.; Zakład Usług Technicznych Tycjan Kołodziejczyk; Paweł Nowicki, Karolina Borkowska, Ewa Kosiacka-Beck; Dżus G.K. Architekci s. c.; Jacek Szczęsny Archi-Cad; Karol Żurawski, Dawid Roszkowski, Natalia Budnik. See: Sztuka Architektury, Cmentarz Żołnierzy Wojska Polskiego na Westerplatte – wyniki konkursu architektonicznego: <https://sztuka-architektury.pl/article/14289/cmentarz-zolnierzy-wojska-polskiego-na-westerplatte-wyniki-konkursu-architektonicznego> (accessed 23 April 2023)

<sup>43</sup> As the head of the jury, Bolesław Stelmach wrote that “The competition was very difficult. On the one hand, it was necessary to design an intimate cemetery for heroes of the dramatic events at Westerplatte and, on the other hand, to find a form timeless, universal commemoration that respects fragile, authentic testimonies history: landscape, terrain, ruins, bomb craters. Submitted works must be rated as good or very good.” See: Sztuka Architektury, Cmentarz Żołnierzy Wojska Polskiego na Westerplatte – wyniki konkursu architektonicznego, <https://sztuka-architektury.pl/article/14289/cmentarz-zolnierzy-wojska-polskiego-na-westerplatte-wyniki-konkursu-architektonicznego> (accessed 23 April 2023)

<sup>44</sup> There are 18 commemorative plaques in the cemetery. They commemorate 15 Polish soldiers who died in the battle; Mayor Henryk Sucharski, who died in Italy in 1946; and two additional symbolic plaques to commemorate two defenders whose remains were found in 2019 and still await the identification.



**Fig. 6 and 7:** The new cemetery of the Polish Army Soldiers in Westerplatte – the result of an international competition for the development of the “Concept of the Military Cemetery of the Polish Army Soldiers in Westerplatte” won by NM architects Tomasz Marciniewicz, Zuzanna Szpocińska, Jerzy Grochulski and Karolina Kayzer.



**Fig. 8:** The excavated foundations of the officer's villa. In the background the new cemetery can be seen. **Fig. 9:** Public information stand displaying a map of the peninsula.



**Fig. 10:** Excavated relics from Guardhouse V destroyed during battle. **Fig. 11:** Reconstructed ramp and earth ramparts sheltering the foundations of Ammunition Warehouse I and Outpost “Wal”.

In January 2023, a new competition was announced: “Architectural and urban competition for the conceptual design of the Museum of Westerplatte and the War of 1939 – branch of

the Museum of the Second World War in Gdańsk”<sup>45</sup>. It was a two-stage limited architectural and urban design competition. It was narrowed to practitioners with experience in delivering similar projects. After the initial verification process, six architectural firms were invited to take part in the next stage of the competition. The scope of the competition included the design of a new exhibition building, as well as the reconstruction, restoration, and display of original historic buildings and relics. It was envisaged to encompass 7,500 m<sup>2</sup> of new usable floor area, including 3,000 m<sup>2</sup> for a new exhibition area.

The decision to organize an architectural competition was based on the importance of the revival of the 1939 Westerplatte Battlefield, which “deserves wider social recognition and is a highly anticipated initiative”.<sup>46</sup> The open-air museum would take advantage of historic surroundings, including authenticated relics of the past. Its main objective is to restore the historical features of the military transit depot, provide better insight into the historic battlefield and foster a better understanding of the first days of the events in September 1939. The investment will be co-financed by the Ministry of Culture and National Heritage of the Republic of Poland.

The Museum of the Second World War in Gdańsk also has plans to rebuild the existing parking lot next to the beach, in order to optimize the number of parking spaces and move tourist vehicles away from the battlefield. The scope of this project would include the construction of a tourist service building with basic amenities such as ticket and information offices and restrooms. A question remains over how ensure the open-air battlefield museum is accessible to people with special needs.

## Conclusions

In open-air battlefield museums, all sorts of memorial components – architectural objects, landscapes, archaeological sites, materials and, where possible, intangible cultural heritage – may be presented as exhibits. The goal is to preserve the site’s historic, symbolic and memorial value.<sup>47,48</sup> Thus the material accuracy of reproduction of events may vary.<sup>49</sup> Fortifications, cemeteries, and archaeological excavations become the main elements of the open-air museum’s expositions, along with spaces for battle reenactment and educational activities. Mariia Brych proposed enhancing associativity of battlefield cultural landscape through the historical reconstruction of military operations.<sup>50</sup>

In the post-war period there was a paradigm shift in understanding cultural heritage. Currently, it is treated as a factor of social and economic development, not only to be protected

<sup>45</sup> See: <https://muzeum1939.pl/en/competition-conceptual-design-museum-westerplatte-and-war-1939/5888.html>, (accessed 23 April 2023)

<sup>46</sup> Ibidem.

<sup>47</sup> “The general objective of the long-term program entitled ‘Construction of the Museum of Westerplatte and the War of 1939 – Branch Museum of the Second World War in Gdańsk’, ... is a unique preservation of historical, spatial, tangible and intangible symbolic values testifying to the heroism and the sacrifice of a Polish soldier.” Muzeum II Wojny Światowej w Gdańsku, Program wieloletni pn. “Budowa Muzeum Westerplatte I Wojny 1939 – Oddział Muzeum II Wojny Światowej w Gdańsku” na lata 2022-2027, <https://www.zpp.pl/storage/library/2022-11/be-6f7e0f7db2b0fffe1daf77facddc32.pdf> (accessed 23 April 2023).

<sup>48</sup> BRYCH, Mariia. Peculiarities of memorial...

<sup>49</sup> GAWEL, Artur (ed.) . *Open air museums in Poland*. Białystok: Association of Polish Open Air Museums. 2019. ISBN: 9788395486814, pp.147-148; Le Linge Memorial Museum, <https://www.cheminsdememoire.gouv.fr/en/le-linge-memorial-museum> (accessed 15 April 2023). Memorial de Verdun. Champ de bataille, <https://memorial-verdun.fr/espace-pedagogique/le-musee-de-plein-air>, (accessed 15 April 2023).

<sup>50</sup> BRYCH, Mariia. Peculiarities of memorial...



but also to be used in creative ways. As a result, many military museums have evolved into modern educational centres with a pacifist message condemning war.<sup>51</sup> The open-air museums of battlefields can create a common ground for the process of healing of memories on the way to peace.<sup>52</sup> History is presented using the universal language of meaning and narration.<sup>53</sup> The new concept of museotherapy represents the role of the museum as an intermediary in enhancing social consciousness and mentality.<sup>54</sup> Cultural heritage is a shared value that can strengthen social cohesion and help build a vision for the future.<sup>55</sup>

On the peninsula of Westerplatte in Gdańsk is an inscription, “NO MORE WAR”, that summarizes the mission and the main objective of contemporary open-air museums of battlefields – to preserve tangible relics and intangible memory for future generations. This is perceived as the duty of new generations towards their predecessors. It is important to commemorate events in ways that are symbolic and intangible by nature. From this perspective, it seems that authentication is not only allowed in the preservation and legibility of relics but also in all means of reproduction – in restoration, reconstruction, restitution, rebuilding, replication, copying, interpretation, reenactment, visualization, and so on – insofar as it does not destroy authenticity. Every trace of the passage of the battlefield through time should be visible. Therefore, it is also important to preserve all the relics from other periods of history, before and after the battle, as evidence of the development of the place. The major importance of the Westerplatte battlefield lies in the original cultural landscape of the military transit depot.

In the case of the Peninsula of Westerplatte, architectural competitions were used to find the best possible projects to commemorate the history, back in the 1960s and again in 2020 and 2023. It seems that architectural and urban design competitions are the most reliable means of delivering viable results, acceptable by the public.

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# The collector Jindřich Waldes and the curator Jan Hofman: One museum, two approaches<sup>1</sup>

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*The collector Jindřich Waldes and the curator Jan Hofman: One museum, two approaches*

The study deals with an aspect not considered until now in relation to the Waldes Museum of Buttons and Fasteners, existing in Prague-Vrřovice between 1916 and 1945, founded at the initiative of Prague industrialist, collector, and patron of the arts Jindřich Waldes. Alongside Waldes, the other key figure was art historian, conservationist and museum curator Jan Ješek Hofman, whose work between 1916 and 1919 in many ways achieved the plan to build a collection and research institution. What was behind this outwardly-representative, functioning private institution and how did the relationship between Waldes, an enthusiastic and affluent private collector, and Hofman, the expert tasked with putting his ideas in place at a professional level, actually evolve? The study aims to present an interpretation of the relationship by analysing preserved archival materials and period publications. It also represents the Waldes Museum as a remarkable museum experiment.

Keywords: Jan Ješek Hofman, Jindřich Waldes, collecting, Waldes Museum

## Introduction

In 1916, prominent Prague businessman, patron of the arts, collector, philanthropist and owner of the world-renowned Waldes & Co. Jindřich Waldes (1876–1941) began fulfilling his dream of creating a museum of buttons, seemingly trivial objects of daily use which fascinated him. This passion probably had its origins in the 1890s.<sup>2</sup> Compared to Waldes' other collections, this did not stand at the same level of investment in art as his well-known collection of paintings, for example. Although he was merely a layperson with no specialised education, Waldes was interested in the button as a cultural object, an artefact used for centuries on human clothing across cultures around the world, an object of social identification and an object of fashion and design, or indeed an object illustrating a range of techniques using a variety of materials. This, in fact, might have summarised in the mind of the collector the arguments in

<sup>1</sup> The study was written as output of the project “Specific Research 2020 – Collecting Buttons as a Societal Element – Comparative Analysis of the Formation, Development, and Importance of Collecting Activities in American and Czech Society in the Years 1850–1940”, which was financed, under no. 2103, with funds from the Student Grant Competition at the Philosophical Faculty, University of Hradec Králové.

<sup>2</sup> In his introductory text to the first edition of the museum periodical *Zprávy musea knoflíků*, he mentions: “I have been dealing with the button for several decades now”. The first issue was published in mid-1916.

favour of creating the Waldes Museum – Collection of Buttons and Fasteners,<sup>3</sup> which existed between 1916 and 1945 as a separate unit of the renowned snap-fastener factory in Vršovice.

Waldes was not the only one within the business environment to build a collection or museum relating to his line of business.<sup>4</sup> Collections and museums focusing on the documentation of specific aspects of everyday human life had been created in Europe even before his own project. Waldes' project, however, was unique in that the museum was to be a place in which to present the collection and a full-fledged scientific institution in one, with its own research and publishing activities. Neither did the museum present, at least directly, the products manufactured within the Waldes empire, Waldes himself rejecting the connection.

The task of expert guarantor of the museum was entrusted to a board of curators comprising representatives of important Prague museums, cultural historians and a great many of his corporate associates and friends, who, in spite of what they might have contended, often supported Waldes' enthusiasm rather than guiding it. The museum took on two experts in September 1916, one of them being Jan Ješek Hofman, now recognised as a prominent Czech art historian, conservationist and museologist. This curious private institution was certainly not the culmination of his career of which he might have dreamed, yet he carried out some remarkable work there, work which has until now been overlooked. Pavel Šopák introduced his study to mark the 115th anniversary of Hofman's birth with the words "There are many unjustly neglected names in the history of conservation".<sup>5</sup> In the case of Jan Ješek Hofman, this is also true when it comes to the Waldes Museum, which is primarily associated with its founder.

The study considers the first intensive period of work at the museum, between 1916 and 1919. The aim is not to provide a factual description of how the museum flourished, but instead to observe this period within the context of Waldes and Hofman as the two main actors of this opening era, because it was their interaction, initiatives and distinct relationships to the very cultural significance of the button that fundamentally influenced the first stage of the museum's existence. In some respects, it might be viewed as a clash between an amateur and a professional, or a dreamer and a realist.

The study partly draws on the second chapter of the author's dissertation "Social role of the button and Jindřich Waldes".<sup>6</sup> It was during the preparation of that dissertation, and thanks to the research conducted, that the need intensified to address the relationship of these two figures, Waldes and Hofman, and in addition to observing their evident contribution to the creation and opening of the museum to reflect the differing approach to the collecting activities of the

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<sup>3</sup> This designation was used by the museum right from the opening of the exhibition in September 1918. The name had been gradually evolving until that time. The topic is mentioned in the study: Helena Koenigsmarková – Filip Wittlich, Uměleckoprůmyslové museum v Praze a Waldesovo museum knoflíků a spínadel všech dob – počátky spolupráce v letech 1916–1920, in: Kateřina Hrušková et al (ed.), *Sborník semináře k 100. výročí otevření Waldesova muzea*, Praha 2018.

<sup>4</sup> Collections or museums that focused on certain fields of production or products were also created elsewhere, e.g. the Zlín collection of historical footwear established by Tomáš Baťa, Iwan Weiskopf's or Otto Riedl's collections of the glass buttons of Jizera Mountain entrepreneurs, Jablonec entrepreneur Albert Sachse's collection of competing costume jewellery products and glass, which was later purchased by the Czechoslovak State, and abroad, for example the Deutsches Klingensmuseum in Solingen or the Deutsche Ledermuseum in Offenbach.

<sup>5</sup> ŠOPÁK, Pavel. Jan Hofman. Ke 115. výročí narození. In: *Zprávy památkové péče 58*, Praha: Národní památkový ústav, 1998, p. 308.

<sup>6</sup> HRUŠKOVÁ, Kateřina. *Společenská role knoflíků a Jindřich Waldes*. Hradec Králové, 2022. Disertační práce, Univerzita Hradec Králové, Filozofická fakulta, Historický ústav, available at: <https://theses.cz/id/in6o73/>.

Waldes Museum and how the importance of the material collected and studied was perceived. This study focuses more on the museological aspects of the subject-matter, something which was not possible in the dissertation in light of its thematic definition. Research was based on an assumption that the approaches of the two figures to both the object of the museum's professional focus and the execution of the planned project differed. Jindřich Waldes initiated the creation of the museum as an act of social significance and enlightenment rooted in his fascination with the button, to which he attached significant cultural and historical value. Jan Ješek Hofman probably took the position for purely existential reasons, but in spite of this he tried to approach the material and the museum itself as critically and methodically as possible. He attempted to test the capacity of the button to become a symbol of a certain cultural circle. The initial situation might sound almost idyllic: a patron of the arts with almost unlimited financial possibilities supports the creation of a professionally-run museum. The paper was written on the basis of a study of source material and professional thematic publications.

### Sources and literature on the subject

A number of titles have already been published on the subject of the Waldes Museum and its collection. The creation of a collection of buttons and fasteners and the founding of the museum itself are considered as a sub-topic of the collecting of Jindřich Waldes in a publication by Patrik Šimon entitled *Jindřich Waldes: sběratel umění*.<sup>7</sup> Šimon does not primarily deal with the museum from the perspective of an analysis of the institution itself, but introduces it as one of Waldes' collecting activities and deals mainly with the significant collections. The book was the first of its kind after the demise of the museum and aroused interest among the professional public in the personality of Jindřich Waldes, his collections and the museum.

The book *Sbírka Waldes*,<sup>8</sup> a catalogue-type publication from 2014, is devoted to the museum and the collection between 1916 and 1938 and offers a cross-section of the preserved part of the collection fund stored at the Museum of Glass and Jewellery in Jablonec nad Nisou (hereinafter MSB) since 1973. For the first time ever, he deals with the use of the file in this institution. At the same time, for the first time ever, it focuses on the value of the collection as a whole in the context of peasant fastenings. A study, "Sbírka Waldes v letech 1946–1977",<sup>9</sup> is dedicated to the fate of the museum and the collection after 1945. The study, supported by the study of legal and archival documents, draws attention to the complex fate of the collection after the Second World War and the inappropriate conditions in which the greater part of the collection was stored, mainly due to the legal vacuum in which it found itself.

Selected collections are mentioned in publications issued to mark thematic exhibitions, such as *Knoflík od rokokoa do secese*,<sup>10</sup> *Necuke: drobná japonská plastika*,<sup>11</sup> and *Karlštejnský poklad*.<sup>12</sup> The Waldes Museum and the figure of Jindřich Waldes are considered from various perspectives

<sup>7</sup> ŠIMON, Patrik. *Jindřich Waldes: sběratel umění*. Praha: Egmont, 2001.

<sup>8</sup> HRUŠKOVÁ, Kateřina. *Sbírka Waldes = Waldes collection = Waldes Sammlung*. Jablonec nad Nisou: Muzeum skla a bižuterie v Jablonci nad Nisou, 2014.

<sup>9</sup> HRUŠKOVÁ, Kateřina. *Sbírka Waldes v letech 1946–1977*, *Fontes Nissae* 22, Liberec: Technická univerzita v Liberci, 2021, pp. 96–110.

<sup>10</sup> MATERNOVÁ, Věra, NEŤUKOVÁ, Runka. *Knoflík od rokokoa do secese*. Jablonec nad Nisou: Muzeum skla a bižuterie v Jablonci nad Nisou, 1976.

<sup>11</sup> BOHÁČKOVÁ, Libuše. *Necuke: drobná japonská plastika*. Jablonec nad Nisou: Muzeum skla a bižuterie v Jablonci nad Nisou, 1975.

<sup>12</sup> KUBŮ, Naděžda, KOENIGSMARKOVÁ, Helena, PANENKOVÁ, Duňa. *Karlštejnský poklad – kultura císařského dvora Karla IV.* Praha: Národní památkový ústav, 2016.



in the proceedings of papers presented at a seminar to mark the 100th anniversary of the opening of the Waldes Museum exhibition.<sup>13</sup> Within the context of this study, it is particularly worth mentioning the paper given by Helena Koenigsmarková and Filip Wittlich, which deals with selected matters from the origins of the museum's existence, emphasising the connection between this small private institution and the Museum of Decorative Arts.<sup>14</sup> The text points to Waldes' high ambitions for the museum's final form.

A number of other publications focus on Waldes' business and collecting activities. In addition to Patrik Šimon's book, mentioned above, we have *Jindřich Waldes: podnikatel, sběratel, mecenáš: katalog výstavy*, which considers many aspects of Waldes' activities.<sup>15</sup>

Jan Ješek Hofman is mentioned only marginally within the context of the museum and his role has not thus far been interpreted as being of any great significance, despite the fact that he played a crucial role in moments such as the organisation of the collection fund, the building of the permanent exhibition, and the publishing activities of the museum. Two biographical studies by Pavel Šopák deal with Hofman, reconstructing a rich professional life during which he was able to make a significant impact on the issue of heritage conservation and the history of architecture. Šopák summed up the professional episode of his working life at the Waldes Museum in both texts always very briefly with only one sentence.

In looking directly at the subject-matter of this study, it is necessary to draw on archive sources and on the period publications of the Waldes Museum, which are also employed here as a source. Materials relating to the running of the museum, acquisitions, publications and exhibitions, or cooperation with other institutions are all found in the Waldes Museum Archive (hereinafter referred to as AMW), which are deposited at the Museum of Glass and Jewellery. The fund has not yet been processed: the materials are merely thematically sorted, and the content of individual boxes is briefly summarised in a makeshift inventory. Minutes of the meeting of the Board of Curators and internal correspondence are of most use to the study, the content of those materials primarily relating to the building of the permanent exhibition. For the most part they are in German, partly in Czech.

The rules for cataloguing and inventory management are summarised by Hofman in a typed document "Návrh na katalogizaci a revizi sbírek Waldesova muzea,"<sup>16</sup> which is part of the Hofman Jan Ješek fund in the Museum of Czech Literature Literary Archive.<sup>17</sup> Other materials which illustrate the subject-matter under consideration are also stored there, primarily private correspondence with Waldes which point to formally polite relations even at a time when Hofman no longer worked at the museum. At the same time, they fit contextually with the correspondence stored in the Jindřich Waldes Fund in the archive of the National Gallery in Prague.<sup>18</sup> In some cases, it is necessary to work with both at the same time to obtain the

<sup>13</sup> HRUŠKOVÁ, Kateřina a kol. (ed.), *Sborník semináře k 100. výročí otevření Waldesova muzea*, Jablonec nad Nisou: Muzeum skla a bižuterie v Jablinci nad Nisou, Praha: Kotěrovo centrum architektury, 2018.

<sup>14</sup> KOENIGSMARKOVÁ, Helena, WITTLICH, Filip. Uměleckoprůmyslové museum v Praze a Waldesovo museum knoflíků a spínadel všech dob – počátky spolupráce v letech 1916–1920. In: HRUŠKOVÁ, Kateřina a kol. (ed.), *Sborník semináře k 100. výročí otevření Waldesova muzea*, Jablonec nad Nisou: Muzeum skla a bižuterie v Jablinci nad Nisou, Praha: Kotěrovo centrum architektury 2018, pp. 34–37.

<sup>15</sup> KRÁLOVÁ, Hana, SOVÁK, Martin. *Jindřich Waldes: podnikatel, sběratel, mecenáš: katalog výstavy*. Praha: Národní technické muzeum, 2021.

<sup>16</sup> Proposal for Cataloging and Revising the Collections of the Waldes Museum.

<sup>17</sup> Památník národního písemnictví (hereafter PNP), Literární archiv (hereafter LA), f. Jan Ješek Hofman, archive collection 540.

<sup>18</sup> Národní galerie v Praze (hereinafter NG), f. Jindřich Waldes, fund no. 101.

complete content of the exchange of information between the two addressees. Correspondence speak of the systematic maintenance of contacts and real cooperation. Unfortunately, it is not very large in scope. In the context of the Waldes Museum, the most valuable document from this fund is the “Návrh na katalogizaci a revizi sbírek Waldesova muzea”.

To get an idea of the shape and development of the interior of the permanent exhibition of the Waldes Museum, which they show, period photographs can also be found in the Fund of the Czechoslovak News Agency.<sup>19</sup>

Museum publications, in particular *Průvodce sbírkami Waldesova muzea v Praze – Vršovicích*<sup>20</sup> and a brochure published to mark the opening of the museum exhibition to the public entitled “Waldesovo muzeum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích,”<sup>21</sup> provide us with a general idea of the collection fund and the appearance of the exhibitions and the other places in the museum, as well as staffing and the composition of the board of curators. In addition to schematic plans, they contain several contemporary photographs of the exterior and interior. One other valuable source is the four editions of *Zprávy Waldesova muzea* magazine, which provide information about the Hofman-designed organisation of collections, the preparation of the exhibition, the activity of the board of curators and new acquisitions. Crucial to an understanding of Hofman’s concept of the cultural and historical value of the button and his thoughts on the concept of the museum is the text of a lecture for the Circle of Cultivating the History of Art, the content of which was subsequently published in *Zprávy Waldesova muzea*.<sup>22</sup>

## Waldes Museum of Buttons

“Apparently, a man who doesn’t have much work or practical sense has established a museum of buttons in Prague in order to add to the number of freaks in the field of collecting.”<sup>23</sup>

The Waldes Museum – Collection of Buttons and Fasteners<sup>24</sup> existed as a unit<sup>25</sup> of Waldes & Co., based in Prague-Vršovice.<sup>26</sup> It actually began its work on July 7, 1916, but it was not until January 12, 1917 that it obtained a permit to operate from the imperial and royal district governorate of Královské Vinohrady.<sup>27</sup> A permanent exhibition and a specialised library were

<sup>19</sup> National Archive, f. Fotoarchiv Československé tiskové kanceláře, Praha 1918–1939 (1950), No. NAD 1451, for example NAD1451 – 27361, 27362, 33441, 33911, 33912.

<sup>20</sup> HOFMAN, Ješek. *Průvodce sbírkami Waldesova muzea v Praze – Vršovicích*, Praha: Waldesovo muzeum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích, 1919.

<sup>21</sup> HOFMAN, Jan Ješek (ed.), *Waldesovo muzeum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích*, Praha: Waldesovo muzeum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích, 1918.

<sup>22</sup> HOFMAN, Jan. *Náš program*. In: *Zprávy Waldesova muzea* 2, Praha: Waldesovo muzeum: Sběrka šatních spínadel všech způsobů a dob, 1917, pp. 1–5.

<sup>23</sup> Jindřich WALDES, *Waldesovo muzeum – světově jedinečné*. K 15. výročí. *Kob-i-noor Magazin*, 4 (45), 1933, p. 2.

<sup>24</sup> This designation was used by the museum right from the opening of the exhibition in September 1918. The name had been gradually evolving until that time. The topic is mentioned in the study: Helena KOENIGSMARKOVÁ – Filip WITTLICH, *Uměleckoprůmyslové muzeum v Praze a Waldesovo muzeum knoflíků a spínadel všech dob – počátky spolupráce v letech 1916–1920*, in: *Sborník semináře k 100. výročí otevření Waldesova muzea*, ed. K. Hrušková et al, Praha 2018, pp. 34–37.

<sup>25</sup> The preserved part of the collection fund is now part of the collection at the Museum of Glass and Jewellery in Jablonec nad Nisou. The collection, known as the Karlštejn Treasure, is found in the collection of the Museum of Decorative Arts in Prague.

<sup>26</sup> Praha-Vršovice, German Prag – Wrschowitz, a district of Prague, the capital of the Czech Republic.

<sup>27</sup> Today Vinohrady, a part of the capital city of Prague.

opened to the public on September 25, 1918.<sup>28</sup>

The aim of the museum was to present buttons and fasteners in a versatile way, not only as fasteners, but also as objects of social identification, fashion and design, or as objects demonstrating the level of craft of a particular community within the contexts of time, place and tradition.

In addition to three-dimensional examples of various fasteners, there were also pictures and a technological archive. Waldes conceived of building the museum as an ambitious project to create a full-fledged collection-building and scientific and research institution in which the button was part of the material and spiritual culture of man, and to which end used and gradually expanded the collection originally established by J. Waldes with purchases and donations. The museum's activities were backed by the board of curators, the advisory board to Jindřich Waldes,<sup>29</sup> who was essentially the director, despite not considering himself to be so. Among the members of the board of curators were, for example, František A. Borovský, then Emeritus Director of the Museum of Decorative Arts in Prague, and its then director František X. Jiřík. These two close friends of Waldes' were able to point the museum on the way to becoming an institution at the same level as the large museums, which was indeed the intention.<sup>30</sup> In the first months of 1916, the members of the board of curators essentially took part in the running of the museum. They compiled museum regulations, defining the key subject-matter of activity and other activities that made the museum an institution suitable for researching the topic of the button and, contrary to the original plan, fasteners. Dana Stehlíková states that the reason for changing the area of interest was the fact that buttons had become more common at the time the museum was established and it was necessary to look for a more specific niche for the newly created collection.<sup>31</sup> The change was justified among the members as a reaction to the fact that the button is naturally linked to other fasteners and clothing, and it would be wrong to separate them.<sup>32</sup> However, it can be reasonably assumed that the inclusion of fasteners in the items collected was influenced by other circumstances too. One reason was the fact that several gifts contained other fasteners, often rare pieces that enriched the collection. Clasps and buckles could open the way to other specialised subjects. What is more, the good availability of fasteners from Roman colonies as archaeological finds, for example, could take the time span of the collection all the way back to Antiquity. The regulations approved on June 7, 1916 stated, inter alia, that "The purpose of the museum is to collect and gather in a scientific way exhibition and study items in the collection if they serve as clothing fasteners".<sup>33</sup> The button

<sup>28</sup> More about the creation of the museum: HRUŠKOVÁ, Kateřina. *Sbírka Waldes = Waldes collection = Waldes Sammlung*. Jablonec nad Nisou: Muzeum skla a bižuterie v Jablonci nad Nisou, 2014, pp. 2–3.

<sup>29</sup> This was essentially an amalgamation of the Management Board, the Executive Committee and the Director's advisory body.

<sup>30</sup> Among its members was Václav V. Štech, who served as secretary of the Ministry of Culture and Education. Of Waldes' partners, there was co-founder of the company and his friend Hynek Puc, his brother Zikmund, running the branch in Dresden, and the director of that branch Eduard Merzinger. The correspondent members included architect Jan Koula, Josef Václav Myslbek, who was also actively involved in the preparation of the exhibition, and Wilhelm Exner, who was incidentally one of the founders and then the director of the Technical Museum in Vienna and the commissioner of the Austrian exhibit at the World Exhibition in Paris in 1900. We should also mention Joseph L. Kottner, administrator of Náprstek Museum in Prague. A complete list of the members of the board of curators can be found in ZWM from 1917 onwards and in the publication brought out to mark the opening of the exhibition in 1918.

<sup>31</sup> STEHLÍKOVÁ, Waldes a ti ..., p. 27.

<sup>32</sup> MSB, AWM, Protokol o jednání kuratoria "Waldesova musea knoflíků" of June 7, 1916, 3 p.m.

<sup>33</sup> Program, bod 3, Zprávy Waldesova musea knoflíků: Sbírka šatních spínadel všech způsobů a dob, v. 2, no. 1, p. 24.

retained the dominant role, as is evident from the content of the collection and the publication activities tied to the museum's work.<sup>34</sup>

The part of the museum fund which still remains is currently located in two Czech collection institutions, namely in the collection of the Museum of Decorative Arts in Prague (hereinafter referred to as UPM)<sup>35</sup> and in the collection of the Museum of Glass and Jewellery in Jablonec nad Nisou (hereinafter referred to as MSB). Both preserved wholes offer a realistic picture of the original museum fund and permanent exhibitions.

The Waldes Museum was unique in its narrow focus on buttons and fasteners; however, the concept of documenting a chosen object of everyday life in all its forms and of bringing a collection, and knowledge, to the general public was not new. Hofman was aware of this fact and, in his search for a concept for the Waldes Museum, sought inspiration from other museums that concentrated on so-called ordinary things. Private collections and museums were created in Europe in the nineteenth and early twentieth centuries with the aim of collecting and documenting activities focusing on specific groups of objects, materials and production techniques or human activities. At the same time, the collections reflect the production techniques and the materials used, or a wide range of existing designs, in some cases with the emphasis on regional tradition. Craft, artisanal and applied products are most commonly seen in the collections. As in the case of the Waldes Museum, these collections often owe their origin to collectors from the rich aristocracy and industrialists, educational institutions or societies. It is typical for them to deal with what are essentially ordinary things, objects associated with everyday life. These might include a variety of tools, cutlery, objects associated with a specific field of production or sporting and leisure activities. Many of them still exist, whether in the form of fully-developed institutions or as collections incorporated into other collection funds. They are an important part of European material culture and a source material for studying everyday life.

In the Czech lands, parallels can be found to the Waldes Museum in the shape of collections of buttons and other items. Of extremely narrow profile are the collections amassed by Dr Iwan Weiskopf and Otto Riedl.<sup>36</sup> Both collections document the development of the phenomenon of what is known as the Jablonec glass button in terms of the technology, design and sheer breadth of the range in the nineteenth and early twentieth centuries.<sup>37</sup> Both are irreplaceable documentation and comparative material within the context of the history of Jablonec costume jewellery.<sup>38</sup> Another domestic example was the collection assembled by Georg Stradiot, a typical collection of nineteenth-century buttons that included a variety of materials and designs. What is more, it was all arranged on so-called collector cards. Georg Stradiot died in 1893, but his

<sup>34</sup> Zprávy Musea knoflíků / Zprávy Waldesova muzea, 1916–1919; Ješek HOFMAN, *Průvodce sbírkami Waldesova muzea v Praze – Vršovicích*, Praha 1919; František Xaver JIŘÍK, *Knoflíky egglomované*, Praha 1917; The appearance of buttons in the collections of the museums of that time was also the focus of unfinished nationwide research by Jan Hofman. Only some of the returned questionnaires have survived from his research.

<sup>35</sup> The collection at the Museum of Decorative Arts also includes a collection known as the Karlštejn Treasure.

<sup>36</sup> Both collections are now found in the collections of the Museum of Glass and Jewellery in Jablonec nad Nisou, sub-collection Buttons.

<sup>37</sup> KYBALOVÁ, Ludmila a kol. *Jablonecký knoflík = Gablonzer Knopf = The Jablonec button*. Jablonec nad Nisou: Muzeum skla a bižuterie v Jablonci nad Nisou, 2007.

<sup>38</sup> They were incorporated into the MSB collection during the interwar period, probably after an exhibition of local history in Smržovka in 1929. Descriptive exhibition cards were created for this exhibition, to which buttons and other objects are applied to this day.

relatives kept the collection, unchanged, keeping it in his house in Šporkova Street in Prague.<sup>39</sup> One example of a collection that centres on a particular branch of production is the collection of historical footwear founded by Tomáš Baťa in Zlín.<sup>40</sup> The collection amassed by Jablonec exporter Albert Sachse (1851–1921), which includes costume jewellery and decorative objects of folk production made by the indigenous tribes of Africa, Asia and Oceania using the glass beads manufactured by Sachse's enterprises, as well as competing products, is also interesting from the perspective of the personal collector's initiative.<sup>41</sup> This is a unique collection that provides evidence of ethnicities from all around the world working with one type of material. Hofman knew of this collection and, in light of his visits to Jablonec nad Nisou, already a renowned centre of button production, it is very likely that he became acquainted with it. Albert Sachse was also a correspondent member of the board of curators and there was a great deal of communication between the two institutions.<sup>42</sup>

### Jindřich Waldes – collector and button lover

Jindřich Waldes (1876–1971) was long fascinated by the button as something of a statement on the status of clothing culture, technology and the artistic aspect of a certain group of people, all in miniature. He was fascinated by the extreme breadth of the shapes, materials and designs of these fasteners and was interested in all forms of the button. Waldes was a respected authority in private collecting, particularly in the field of fine arts. The button collection, therefore, is somewhat out of sync with his other activities. Its origins probably date back to the 1890s,<sup>43</sup> with the collection being amassed from items that Waldes acquired during his trips abroad.<sup>44</sup> It therefore included unusual and technologically or materially interesting pieces, souvenir buttons and curiosities. Together with donations and purchases, Jindřich Waldes and his wife Hedvika built up the museum's exhibition in the interwar period in this way. Compared to Waldes' other collections, it was not an investment in art, such as his famous collection of paintings.

Just as Jindřich Waldes was a confident *self-made man* in the world of business, he was sure of his own erudition in the expert approach to buttons based on his own interest in the topic alone: "I have been dealing with the button for several decades now, from various perspectives."<sup>45</sup> He considered himself to be an expert capable of researching the button and, above all, capable of guaranteeing the high-quality output of specialised work.<sup>46</sup> Apart from proclamatory or educational texts, however, he never did publish any studies or texts that would exhibit the parameters of an expert paper. The various functions of the button for people, particularly within the European cultural space, were more important to Waldes than the technological side of affairs. One aspect that is completely omitted with regard to Waldes' attempt to capture

<sup>39</sup> TURNWALD, Kristian. Stradiotova sbírka knoflíků. *Kob-i-noor Magazin 90*. Praha: Waldes & Co., 1937, p. 141.

<sup>40</sup> STEHLÍKOVÁ, Waldes a ti ..., p. 27.; Now incorporated in the collection of the Museum of Southeast Moravia in Zlín.

<sup>41</sup> JIROUŠKOVÁ, Jana a kol., *Albert Sachse's collection in the National Museum*, Praha: Náprstkovo muzeum, 2011, p. 9.

<sup>42</sup> MSB, AWM, Zápis o schůzi kuratoria Waldesova musea knoflíků ve Vršovicích dne 14. března 1917 o 3 hod. odp., p. 3.

<sup>43</sup> In his introductory text to the first edition of the museum periodical *Zprávy musea knoflíků*, he mentions: "I have been dealing with the button for several decades now". The first issue was published in mid-1916.

<sup>44</sup> WALDES, Jindřich. Moje museum. *Zprávy musea knoflíků Jindřich Waldes Praha-Vršovice* (Zprávy Waldesova musea knoflíků), Praha: Museum knoflíků Jindřicha Waldese, 1916, pp. 1–2.

<sup>45</sup> WALDES, Moje..., p. 1.

<sup>46</sup> Ibidem, p. 2.

the button as comprehensively as possible, both within his own concept and Hofman's, is particularly striking: in spite of Waldes being an entrepreneur in haberdashery and related industries, the economic contribution of this line of production as such, or indeed of buttons within the modern concept of industrial batch production, was not fundamentally emphasised. Button-making was reflected in the museum from the perspective of regional tradition and the development of technology. We might assume that this was one way of distinguishing itself from *Butonia*, already an established periodical, which can be considered the magazine of the button industry, and which took economic matters into consideration.

It is also clear that Waldes was not interested in building a purely private museum whose purpose it would have been to present a closed, museum-style private collection. He aimed to pursue two fundamental objectives: namely to create a publicly-accessible collection of buttons that would document the maximum diversity of the subject-matter across cultures, and down the history of human culture, and to contribute toward education in the field. Secondly, he saw the need to create a specialised publication that would deal with the button in a universal way and fill a gap in cultural history. Waldes was by no means interested in presenting Waldes & Co., a fact that distinguishes him, and his museum, from the Leoty Company project, for example, and its collection of corsets, and from the Bat'a Museum. It was František Borovský who came along with the idea of incorporating the products currently being made at Waldes' enterprise into the museum collection and exhibition. Waldes rejected the proposal outright. In discussing Borovský's proposal, he stated that "the whole venture has absolutely nothing to do with Waldes & Co., the company contributes nothing to the purposes of the museum and the museum should not be an advertisement for the company".<sup>47</sup>

He left nothing to chance and from the very outset his aim in building the museum was to create a full-fledged collection and science institution. The establishment of a pictorial folk costume archive meant that his collection of buttons was unlike any other, in that the button was perceived as being and professionally treated as an object in its own right. In this case, it was not seen merely as a demonstration of craftsmanship, a sample of the manufacturer or a work of art that "accidentally" became a button, the original functionality completely lost. Emphasis was also placed on presenting a wide range of specimens, demonstrating the different styles of execution and the different cultures they came from, while exclusive and costly products were presented alongside cheap products available to the less affluent parts of society. The stress was placed on the button as a functional object connected with people and their clothing.

### Jan Ješek Hofman – collection clerk/manager and director

The increase in administrative work at the newly-created museum led to the need to hire qualified employees who would take up tasks such as recording the collections, editing the museum magazine, managing the library and preparing the museum exhibition. This requirement was first discussed at the meeting of the board of curators on August 17. The minutes from August 30 read that "so many applications have been submitted for the post of museum clerk that, in the interests of the museum, a decision will be postponed for some time".<sup>48</sup> Jan Ješek Hofman (1883–1945) was hired as museum clerk in September 1916. The recruitment process included

<sup>47</sup> Protokol o jednání kuratoria "Waldesova musea knoflíků" dne 17. srpna 1916 o 3 hod. odpolední.

<sup>48</sup> MSB, AWM, karton F, Protokol o schůzi kuratoria "Waldesova musea knoflíků" dne 30. srpna 1916 o 3. hod. odpolední, p. 1.

an interview with an important member of the board of curators, František Borovský,<sup>49</sup> and a vote taken by the board on his acceptance. Jan Hofman had studied law at Karlo-Ferdinand University,<sup>50</sup> and subsequently the history of art, thereafter gathering professional experience, for example, as the executive director and an active member of the Club for Old Prague, where he also proved to be a good organiser. He joined the museum from the position of member of the Archaeological Staff at the Museum of the Kingdom of Bohemia.<sup>51</sup> According to the records of the board of curators, at the beginning of the museum's existence its members sought ways of achieving Waldes' plans and of fully supporting the project in all feasible ways, and of asserting their own intentions as an aside. In this respect, Hofman's position was different. He essentially became Jindřich Waldes' counterweight. Hofman's position frequently changed in name, and he was most commonly referred to as museum clerk<sup>52</sup> or manager of the collections<sup>53</sup> or of the museum.<sup>54</sup> He held the post of director of the museum from January 16, 1919 until shortly before his time there came to an end. The second professional was Dr Paula Wahle (1884–?),<sup>55</sup> who was probably taken into employment even before Hofman, on September 15, 1916, her arrival being announced at a meeting of the board of curators on September 13, 1916. The minutes of that meeting show that discussions regarding Hofman's arrival, which, according to the preserved correspondence had been ongoing since at least September 9, had not yet been brought to a conclusion. According to the minutes, however, he was to have been hired without further delay. The arrival of these two professionals marked a short period of professionalising the museum.

From the very outset, Hofman showed his ability to find his way around the issue of buttons and fasteners, to think methodically about the collection and to seek inspiration in other institutions having a strong focus on a single theme, even beyond the borders of the Austrian Monarchy. His cool, rational approach was in sharp contrast to Waldes' almost uncritical enthusiasm. Hofman had a significant influence on the organisation of the collection and on professional work with it, conducted his own research and greatly improved the quality of publishing activities. From the point of view of the actual development of the museum as a scientific institution, he was clearly the key figure. It was during his time there that a permanent exhibition, one that he had conceived, opened its doors in the building at what is now Moskevská Street 262 in Prague-Vršovice.

Hofman's concept of organising the collection, included in a report he wrote on activities for the month of November 1916, was presented to the meeting of the board of curators on

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<sup>49</sup> Památník národního písemnictví (hereinafter PNP), Literární archiv (hereinafter LA), f. Jan Ješek Hofman, archíve set no. 540, letter from J. Waldes to J.J. Hofman of September 9, 1916.

<sup>50</sup> Now Charles University, Prague

<sup>51</sup> Now the National Museum, Prague; HOFMAN, JAN, 1883–1945, accessed September 20, 2022, <https://provenio.net/records/c530d758-8344-4283-8e89-85d528c6b83b>.

<sup>52</sup> He was also referred to as clerk and manager during the meeting of the board of curators in 1918, for example: MSB, AWM, box F, Zápis o schůzi kuratoria Waldesova musea o 3. hodině odpoledne dne 6. února 1918 v úřadovně pana Waldesa ve Vršovicích.

<sup>53</sup> He was mainly identified in this way in documents from 1917, for example: MSB, AWM, Zápis o přípravách k otevření nových místností Waldesova musea v bytě pana Waldesa dne 13. září 1917 o 4 ½ hod.

<sup>54</sup> For example, MSB, AWM, box F, Protokoll der Kuratoriumumsetzung des Knoúf-Museum Heinrich Waldes, Prag-Wrschowitz am 19. Dezember 1917 3 Uhr Nachm. im Bureaux des Herrn Waldes; concept of an article for *Časopis společnosti přátel starožitností českých v Praze*, vol. 25 / 1917, no. 1.

<sup>55</sup> She took a leading position after Jan Hofman's departure in 1919.

December 6, 1916.<sup>56</sup> Compared to the original sorting by material and processing technology that had emerged from previous proposals made by the board of curators, Hofman gave supremacy in sorting to the period of history, only then dividing objects according to material and technology within individual groups. At the same time, he proposed the creation of a collection catalogue. Hofman received the support of the members of the board of curators for this conceptual change, particularly from Borovský and Štech. Less than six months later, he presented his proposal for the arrangement of the permanent exhibition to the board of curators.<sup>57</sup>

Hofman's situation at the museum, however, was not easy. According to the minutes from the meetings of the board of curators still in existence, he only rarely engaged in the meetings, despite being in attendance in most cases. When his comments do appear in the minutes, they refer to truly fundamental issues, proving Hofman's ability to identify the needs of the museum and the exhibition. Jindřich Waldes involved himself in all matters surrounding the museum on a daily basis, as evidenced by extensive correspondence.<sup>58</sup> Although there is no evidence of specific disputes on the issue of building the collection, we are able to see the two protagonists' differing views of the cultural and historical value of buttons. Neither was cooperation helped by the comments and instructions that Waldes sent as often as several times a day. The choice and use of words indicate a certain level of tension.

In 1917, Hofman initiated a new record of exhibits and their division into four groups: a collection of three-dimensional objects, duplicates, the pictorial folk costume archive and the library. Two card catalogues were created for research purposes, kept in Czech and German, one taking into account chronological and the other technological division. The collection of fasteners was further divided into the General Historical Collection (the period development of fasteners according to artistic styles), the Ethnographic Collection (European ethnography) and the General Ethnographic Collection (ethnography outside Europe). The permanent exhibition copied the division of the collection. The archive of visual and written material comprised the Pictorial Archive of Folk Costumes, the Collection of Negatives and Slides and the Historical and Technological Archive, which also contained archival extracts. The library collected books and periodicals, exchanges taking place with institutions around the world, mainly in Europe and North America, the Metropolitan Museum in New York included.

The visual archive and the library were enlarged considerably as a result of positive ties with a number of domestic and foreign museums, and indeed private collectors,<sup>59</sup> from whom it was possible to obtain comparative visual material.<sup>60</sup>

Nonetheless, Hofman's work at the museum is defined by the years 1916–1919. He did,

<sup>56</sup> MSB, AWM, box F, Protokol o schůzi kuratoria "Waldesova musea knoflíků" ve středu dne 6. prosince 1916 o 3 hod. odpol.

<sup>57</sup> MSB, AWM, box F, Zápis o schůzi kuratoria Waldesova musea knoflíků, v Praze – Vršovicích dne 2. května o 3 hod. odp., pp. 1–2.

<sup>58</sup> MSB, AWM, box M63, Soubor interní korespondence úředníků muzea s továrníkem Waldesem.

<sup>59</sup> In 1917, a set of photographs was obtained of the collection of Albert Figdor, a prominent collection which focused on artistic craftsmanship.

<sup>60</sup> This route stemmed from the connections of J. Waldes and the director of the Dresden subsidiary Eduard Mezinger. The Museum of Decorative Arts in Prague was an important partner. E. Mezinger managed to negotiate the possibility of creating documentary paintings of buttons from the collection of Klenotnice Grünes Gewölbe, establishing cooperation with the Landesmuseum für Sächsisch Volkskunde, with the Deutsches Museum in Munich, and with the Berlin Modenmuseum, to which the Waldes Museum gifted 247 fasteners from the collection of duplicates. Relations were also established with museums in Poland, Sweden and Yugoslavia.



however, continue his professional theoretical activities and most likely his editorial activities even after his departure. Perhaps his most important piece of work for the museum dates back to November 1920: comprehensive methodological material that deals with new records and the organisation of collections and at the same time addresses subsequent inventory-taking.<sup>61</sup> With this manual, Hofman endeavoured to come to terms with the consequences of the frenzied period of acquisition at the beginning of the museum's existence. He himself states here that objects intended for permanent exhibition had been put on record as a priority. At the same time, he offers the solution of separating insufficiently valuable material from the collection without the need to directly discard and dispose of it by creating a so-called definitive depository to hold objects that will not be used in the exhibition or for study. The material cited also indicates that it was created at the request of J. Waldes, who demanded the accelerated completion of proper collection records at the museum. Whether or not new records were made is difficult to prove with absolute certainty. Whilst a record number from the Waldes Museum was identified on a number of objects after thorough examination of the preserved part of the collection stored at the MSB, it cannot be said whether this number is original or new. However, given that these are, in many cases, objects that were provably displayed in the exhibition and are in the minority, we can assume that no new records were made. For the sake of completeness, it should be added that the original inventory has not yet been identified and possibly no longer exists.

Hofman also proposed the introduction of new record cards, supplemented by photographs or drawings. The material shows that the keeping of cards in this way was approved by the board of curators even before the creation of the manual.

Nevertheless, Hofman was inspired in shaping the concept of the museum by foreign projects. Those which appealed to him the most were also provided as examples in a text he wrote entitled "Náš program".<sup>62</sup> One example of a museum having a narrow profile and focusing on one phenomenon, a museum which still exists to this day, is the Musée de Cheval, created on the premises of the French Chateau Saumur.<sup>63</sup> This aimed to document horseback riding from all possible angles from throughout the history of humankind. A parallel with the Waldes Museum was apt here mainly because a wide range of items relating to the fastening of clothing and covering the widest possible spectrum of the subject became part of the collection during its first two years. The Musée de Cheval was created only four years before the Waldes Museum, and its beginnings were marked by great enthusiasm and many selfless donations of exhibits. Older, but in certain ways analogous to the original, more-monothematic museum in Vršovice, was a collection of corsets built by the owners of the world-famous French company Maison Leoty and Ernest Leoty's publication *Le Corset à travers les âges*,<sup>64</sup> focusing on the historical development of the women's corset. This work was and remains quality methodological inspiration and an example of the universal cultural-historical treatment of a specific object of daily necessity. Applying this to the context of corsets, let us recall Waldes' idea that the evolution of the button reflects therein the cultural development of society. The development of the corset too reflected the gradual shift in society, not only in terms of fashion, craft and material, but also of the attitudes and opinions of certain groups

<sup>61</sup> Památník národního písemnictví (hereinafter PNP), Literární archiv (hereinafter LA), f. Jan Ješek Hofman, archive set no. 540, Návrh na katalogizaci a revizi sbírek Waldesova muzea, datováno 23. listopadu 1920.

<sup>62</sup> HOFMAN, Náš program... p. 1.

<sup>63</sup> Saumur, France.

<sup>64</sup> Full version of the text: [https://fr.wikisource.org/wiki/Le\\_Corset\\_%C3%A0\\_travers\\_les\\_%C3%A2ges](https://fr.wikisource.org/wiki/Le_Corset_%C3%A0_travers_les_%C3%A2ges).

of society.

The second publication that Hofman liked to mention and that might have helped from a methodological point of view was a study by Karl Weule on arrows used by the indigenous tribes of Africa. The work, entitled *Der afrikanische Pfeil: eine anthropogeographische Studie*, from 1899, combined taxonomic, ethnographic, technological and anthropological approaches to the objects. Hofman tried to apply the methods of this work and research when sectioning and subsequently processing the museum collection.

Hofman also had the opportunity to observe the arrangements of various collections of buttons at reputable institutions, for example ethnographic museums in Germany, with which the Waldes Museum maintained lively contacts and professional cooperation. Examples include the Royal Ethnological Museum in Berlin and the Bavarian National Museum in Munich, whose exhibits included a large tableau of buttons for folk costumes. Selected collections at these institutions were photographed and this study material is still found in AMW.

### Waldes and Hofman

Waldes himself stated, both in the early days of the museum and in the 1930s, that he was interested in the button as an object of “cultural historical significance”. In his introductory text to the very first edition of the museum periodical *Zprávy musea knoflíků* (Museum of Buttons News), he outlined his basic hypothesis surrounding the importance of the button.

The button, the fastening of clothing, is in the true sense a measure of national culture and often even a form in which the culture of nations appears. – The button played a significant role in the lives of all peoples past and present, and will surely continue to have such a role in the future.<sup>65</sup>

Jindřich Waldes appealed the need to consider the button from many angles, not merely as various materials and technologies or a specific item of folk or fashion clothing. He primarily saw the button as being “a faithful guide to man”. He saw various meanings and ways of using the button and the ability of this object to take on various forms and functions in line with human needs. Hofman also noticed the close connection between button and man, considering it “part of the physical person”,<sup>66</sup> and at the same time “an organic part of” clothing.<sup>67</sup>

Waldes emphasised that one of the functions of the museum was to inspire the button industry through exhibition and publication activities and to provide it with a high-quality professional background. “The modern realisation that only science and art together can produce quality work, and that only such work has a chance of lasting success, pervades even in the button industry.”<sup>68</sup> There is a certain shift in Waldes’ definition of the significance of buttons and fasteners to humans. At the time of the museum’s creation, he emphasised and preferred objects that reflected folk culture, because fasteners are an integral part of folk jewellery. In the 1930s, his appraisal writings focus more on the ability of fasteners to reflect artistic styles within the bounds of the periodisation of European history. What remained unchanged in Jindřich Waldes, however, was his almost obsessive predilection for the maximum variety of buttons in terms of their secondary functions, a direction he never took in relation to other fasteners, even though feasible to a more or less identical extent.

<sup>65</sup> WALDES, Moje..., p. 1.

<sup>66</sup> HOFMAN, Náš program... pp. 1–5.

<sup>67</sup> HOFMAN, Náš program... pp. 1–5.

<sup>68</sup> WALDES, Moje..., p. 1.

The crucial aspect on which Waldes and Hofman disagreed was the volume by which the collection was to grow. Waldes was uncritically fascinated with the rapid growth in the volume of new acquisitions, wanting the museum to include the widest possible range of material. On the contrary, Hofman was opposed to the permanent accumulation of new additions and rejected the so-called “sport of collecting”.<sup>69</sup> He was well aware that any unsystematic intake of additional items, mainly gifts, was not a good way to go. Moreover, he did not consider it expedient to take in more items than his expert staff was able to process. There was therefore clear conflict in terms of the ambitions and inspirations involved in building the museum. Jindřich Waldes wanted to build a monothematic variant of the Museum of Decorative Arts in Prague or the Kunsthistorisches Museum in Vienna. Hofman was more restrained and sought inspiration in more feasible concepts, such as the Musée de Cheval or the Maison Leoty collection. He created the museum programme mentioned above in 1917, defining in the first place therein that it was necessary to maintain the exclusivity of the museum. He was critical of too much emphasis on the curiosity of the topic, as the elementary values of the assemblage, and above all a one-sided methodology of work that prevented the creation of synthetic works. He appealed strongly for the extension of the collection-forming plan to include representatives of fasteners and fabrics as a whole, precisely in the interest of synthetic work. At the same time, he sought to clearly define the methodology of museum work in line with the above concepts. He also worked over the long-term on defending the uniqueness and need for the existence of the museum, looking for reasons to anchor it in the museum network of the time, and began his own research, inter alia conducting a questionnaire survey on the fasteners found in the museum collections of Bohemia, Moravia and Silesia. Unfortunately, this project was never completed, or even published on an ongoing basis, although some of the collected materials remain to this day and have already been partially analysed.

In 1917, Hofman gave a lecture to *Kruh pro pěstování dějin umění* (Circle for the Cultivation of the History of Art),<sup>70</sup> in which he theoretically dealt with the significance of buttons and fasteners and presented his concept for basic categorisation and development within the context of European history. He outlined various aspects of research and essentially summarised his views on the concept of the Waldes Museum.<sup>71</sup> Hofman defined the button as a “culturally historical detail that is significant by way of its purpose”.<sup>72</sup> In doing so, he confirmed his intention to place emphasis on the button as a fastener, and not simply a work of art in itself. At the same time, he pointed out that from the formal technical point of view, the button had reached its peak and could not be spoken of in the context of absolute progress, but that, from the perspective of transformations in its aesthetic and material concept, the button could be associated rather with “a concept of development whose wave rises or falls and is constantly developing, without being of unchangeable qualitative scales”.<sup>73</sup> This markedly distinguished him from Jindřich Waldes, who held the view of continual development. Hofman, of course,

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<sup>69</sup> HOFMAN, Jan. Program Waldesova musea, *Waldesovo museum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích*, Praha: Waldesovo muzeum. Sběrka šatních spínadel, 1918, p. 4.

<sup>70</sup> The Association of Theoreticians and Art Historians existed in Prague between 1913 and 1960.

<sup>71</sup> The talk was first recorded and published in the first issue of ZWM in 1917 and was subsequently used in edited form as the introduction to the publication brought out to mark the opening of the WM. Jan HOFMAN, *Náš program*, *Zprávy Waldesova musea*, 2 (1), 1917, pp. 1–5.

<sup>72</sup> HOFMAN, Program Waldesova..., p. 4.

<sup>73</sup> HOFMAN, Jan. O rozdělení a úkolu musejních sbírek. *Waldesovo museum: Sběrka knoflíků a šatních spínadel v Praze Vršovicích*, Praha: Waldesovo muzeum. Sběrka šatních spínadel, 1918, p. 24.

also focused on the aesthetic development of fasteners and his curation work was done well. Within the collection, it is possible to trace the collections that really work with the development of the artistic motif, from jewellery work to certain devaluation by batch production, or the transfer of the motif from fashionable luxury to cheap folk button.<sup>74</sup>

He defined the so-called forms of clothing to which buttons and other fasteners put the finishing touches, namely the *purposeful form*, which relates to, for example, the protection of the human body, and the *artistic form*, which directs how the appearance of clothing is completed, thus providing the fastener used with certain intentional aesthetic properties.<sup>75</sup> According to Hofman, the button could be examined on its own, without stitching or the context of the clothing, because, unlike other fasteners, its purpose is clearly informative. In general, however, he preferred the connection of fastener and garment, not only when demonstrating the purpose, but mainly because fasteners developed in parallel with clothing. He was of the view that the fastener could be examined as a source of different information from the technical and artistic points of view. From the perspective of production technology, this often involves elementary processing technologies, meaning that the button can be used, in the right way, to document the development of production and processing techniques. Fasteners can be used to point to the development of artistic craftsmanship and changes in design, or indeed the development of methods of fixing items to and assembling them on clothing. He distinguishes between fashion items and folk items, when the use of an artistic motif in the latter cannot be categorised under a certain period as in the case of fashion goods.

He also draws attention to the fact that buttons in particular become mere ornaments and thus lose their original function. Reference is made to Heinrich Wölfflin (1864–1945)<sup>76</sup> and his methodology of art history and it is in this spirit that Hofman tries to identify individual types and characteristic features of certain groups of specific objects. He uses the term *the architecture of clothing*,<sup>77</sup> where the garment reflects period architecture and artistic concepts; the basic silhouette, the structure, the choice of fabrics and, of course, jewellery, buttons and other fasteners are thus a natural part of the desired shape of the garment. Here we can find analogies with the prevailing style of the period from which the garment comes. This was reflected in Hofman seeing certain technological and artistic features as the primary aspect and at the same time trying to sort the collection according to real use so that he could refer individual groups to use on a particular garment. Hofman thus first examines the fastener itself and only then puts it into the context of real clothing. This is also tied to his initiative to introduce whole parts of clothing to the collection plan. This would facilitate a truly comprehensive study and presentation of buttons and fasteners, unlike other collections of buttons displayed in public, where the button is collected as an objet d'art in itself, in miniature. This is particularly evident when buttons are collected for aesthetic, material, curiosity or souvenir value alone.

<sup>74</sup> One example is a set featuring components made of Wedgwood stoneware. It includes both original products and a wide range of imitations, from luxury to inexpensive, and incorporates separate components made of stoneware and metal, and a rare fragment of terra sigillata from the Ittenweiler site in Alsace. Wedgwood worked with the technology of terra sigillata and the motif is at the same time on one of the buttons. Literature on the topic can be found in the archive. The collection was included in a study published in the museum magazine.

<sup>75</sup> HOFMAN, *Náš program...* p. 2.

<sup>76</sup> Swiss art historian.

<sup>77</sup> HOFMAN, *Náš program...* p. 3.

## Conclusion

The Waldes Museum existed for fewer than 30 years. The first short stage of its existence, between 1916–1919, was by far the most interesting and can be seen as an experiment in building a private scientific institution focusing on buttons and fasteners. Jindřich Waldes' enthusiasm, connections and money facilitated the creation and flourishing of the museum, while the scientific erudition of Jan Ješek Hofman transformed it into a professional institution. The museum carried out specialised publishing work, cooperated with other institutions and built a collection and exhibition. Hofman and external workers conducted research in their fields. Even seen through today's optics, they could certainly have sought recognition as a scientific research institute.

Hofman was an entirely fundamental figure, without whom the museum would not have reached such a high professional level. Unfortunately, he left the museum in mid-1919 after accepting a job on the *Vládný komisariát na ochranu pamiatok* (Government Commission for the Protection of Monuments),<sup>78</sup> working under the guidance of Dušan Jurkovič.<sup>79</sup> He had, apparently, been considering leaving after the war was over.<sup>80</sup> Accepting a position at the Waldes Museum was probably not his career goal in any case. One other reason for his departure was likely the fact that the museum exhibition was practically finished, and the guide to the exhibition which Hofman had prepared had been published. Although Hofman's departure was a significant loss for the museum, it is clear from the correspondence we still have that the relationship between the two protagonists remained decorous, perhaps even friendly.<sup>81</sup> Hofman did not leave the museum overnight. In 1920, he drafted a proposal for a new concept of working with the collection in terms of records and inventory-taking. He was also the editor of the final edition of *Zprávy Waldesova muzea*. His departure led the museum to stagnate, becoming an exhibition hall for the button. The museum became an interesting social space that was used for corporate representation and informal business meetings. After the Second World War, the museum was closed and its collections were subsequently transferred to the administration of the Museum of Applied Arts in Prague as a deposit. Currently, the preserved parts of the collection are located both in this museum and in the Museum of Glass and Jewellery in Jablonec nad Nisou, where a numerically larger part of the collection was transferred in 1973.<sup>82</sup>

The four years of cooperation between Waldes, as collector, and Hofman, as collection manager, was a creative period influenced by the collector's passion and love for the button

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<sup>78</sup> State office operating in Slovakia in the years 1919–1922. His was the protection of cultural and historical monuments. From 1922, it changed to the *Štátny referát na ochranu pamiatok na Slovensku* (State Department for the Protection of Monuments in Slovakia), and Jan Hofman became its director. More: STOCKMANN, Viliam. Vývoj štátnej ochrany prírody na Slovensku v rokoch 1918–1938. In: *Životné prostredie. revue pre teóriu a tvorbu životného prostredia* 50, Bratislava: Institute of Landscape Ecology SAS and BIOSFÉRA, Landscape Ecology Foundation, 2016, pp. 195–204. Online: [http://publikacie.uke.sav.sk/sites/default/files/2016\\_4\\_195\\_204\\_Stockmann.pdf](http://publikacie.uke.sav.sk/sites/default/files/2016_4_195_204_Stockmann.pdf)

<sup>79</sup> ŠOPÁK, Pavel. Jan Hofman. Ke 115.výročiu narodenia. In: *Zprávy památkové péče* 58, Praha: Národní památkový ústav, 1998, p. 309.

<sup>80</sup> ŠOPÁK, Pavel. Jan Hofman – pokus o portrét, *Umění* 51, Praha: Ústav dějin umění, Akademie věd České republiky, 2003, p. 115.

<sup>81</sup> This is evidenced by the correspondence we still have to this day: for example, condolences on the death of Hofman's mother, New Year wishes or Hofman's gift of two buttons to the museum collection, probably at the end of 1937 (Památník národního písemnictví (hereinafter PNP), Literární archiv (hereinafter LA), f. Jan Ješek Hofman, archive set no. 540, Letter from J. Waldes to J. J. Hofman of January 4, 1938.)

<sup>82</sup> More: HRUŠKOVÁ, Kateřina. Sbirka Waldes v letech 1946–1977, *Fontes Nissae* 22, Liberec: Technická univerzita v Liberci, 2021, pp. 96–110.

and the erudite and rational approach of its manager, who was able to set real limits on the collector's ambitions. Observing the first period of the museum's existence not through the number of collection items, but through these two figures, shows this chapter in the history of the Waldes Museum to have been a creative process based on the dualism of two prominent personalities.

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# Dorothy Mackay: A Forgotten Female Pioneer in Archaeology

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## *Dorothy Mackay: A Forgotten Female Pioneer in Archaeology*

In 2022, the author of this paper came across four letters regarding epigraphic documentation of some elite tombs in the Theban necropolis, Egypt, written by Dorothy Mackay and addressed to Alan H. Gardiner, at the archive of the Griffith Institute, University of Oxford. The author of the letters was the wife of Ernest Mackay (1880–1943), a British archaeologist best known for his later work on the Indus Valley Civilisation, who was excavating on the Theban west bank between 1913 and 1916. However, as further investigation revealed, Dorothy, until recently an obscure figure, was an accomplished scholar in her own right, who worked together with her husband, acted as a curator of two museums, and published extensively in times when it was far from easy for women to obtain an education, let alone conduct research. Despite that, the only recent sources discussing Dorothy and her scholarly accomplishments lack some vital details on her life. The aim of this contribution is to provide some further information and context on Dorothy Mackay and her research in the first half of the twentieth century.

Keywords: Dorothy Mackay, archaeology, museology

## Introduction

In 2022, the author of this paper came across four unpublished letters regarding epigraphic documentation of some elite tombs in the Theban necropolis (opposite the modern city of Luxor, Egypt), written by Dorothy Mackay and addressed to Alan H. Gardiner, at the archive of the Griffith Institute, University of Oxford. Their author was the wife of Ernest Mackay (1880–1943), a British archaeologist best known for his later work on the Indus Valley Civilisation, who was excavating on the Theban west bank between 1913 and 1916. However, as further investigation revealed, Dorothy, until recently an obscure figure, was an accomplished scholar in her own right, who worked together with her husband, acted as a curator of two museums, and published extensively in times when it was far from easy for women to obtain an education, let alone conduct research. Despite that, the only recent sources discussing Dorothy and her scholarly accomplishments are the excellent studies of Amara Thornton (2018), which however lack some vital details on her life.<sup>1</sup> It is hoped that this paper will provide some further information and context on Dorothy Mackay and her research in the first half of the twentieth century.

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<sup>1</sup> Thornton's monograph (*Archaeologists in Print*, London, 2018), as well as her later blog entry, also from 2018 (*Discovering Dorothy*, accessed March 3, 2023, <https://www.readingroomnotes.com/home/discovering-dorothy>).



## First steps in archaeology

Dorothy Mary Simmons was born on November 11, 1881 in Ardencote, Thornhill Road, Croydon, to Agnes Grace Simmons (formerly Bayliffe) and Thomas Frederic Simmons.<sup>2</sup> As stated on her birth certificate, her father was a commercial traveller. In 1883, Thomas Simmons established a company manufacturing prams – a venture which placed him among the most successful entrepreneurs in the area.<sup>3</sup> Dorothy became a student at University College, London, where she was awarded a Bachelor of Arts degree in 1902 (she took courses in Greek and French), and then a Bachelor of Science degree in Zoology in 1909.<sup>4</sup>

It would seem that she was a supporter of the women's suffrage movement: this is certainly suggested by the fact that she was a member of the Croydon Branch of the Women's Social and Political Union.<sup>5</sup> The February 20, 1907 issue of the *Croydon Times* contains the following note: "The committee hope that the Croydon women will show their appreciation of this courage and devotion to the cause [this is a reference to the imprisonment of several women protesting at the House of Commons] by joining the Branch. The hon. Secretary, Miss Dorothy Simmons, B. A., will be glad to receive their names at her address, 5 Heathfield-road".<sup>6</sup>

Dorothy married archaeologist Ernest John Henry Mackay: the ceremony took place on December 7, 1912 in the church of St Peter in Croydon.<sup>7</sup> Soon afterward they left for Egypt. On March 5, 1913, they arrived in Luxor where Ernest was to start his job as an archaeologist employed by Robert Mond, responsible for the excavation and conservation of tombs in the famous necropolis of ancient Thebes.<sup>8</sup>

In Egypt, Dorothy took an interest in epigraphic work: she was eager to learn and started working on the documentation of the tombs belonging to some of the most important Egyptian officials of the New Kingdom: Nebamun (TT 90), Amenhotep Huy (TT 40), and perhaps also Dedi (TT 200). At the archive of the Griffith Institute, University of Oxford, there are four letters sent by Dorothy at that time to the Egyptologist Alan H. Gardiner with her account of work in the tombs.<sup>9</sup> Soon Gardiner hired Dorothy to produce illustrations for his publication.<sup>10</sup>

Her documented activity in the Theban necropolis suddenly ends in 1914, when she disappeared from the written record. This is most likely a result of a major event in the Mackay family: on August 16, 1914 Dorothy and Ernest's first son, Richard Dermott Mackay, was born.<sup>11</sup> Dorothy came back to Egypt, along with little Richard, in 1915 at the latest to accompany her husband, and perhaps visited him also in 1916.<sup>12</sup> The birth of their second child, Peter John,

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<sup>2</sup> General Registry Office (England and Wales). Births in the Sub-district of Croydon in the County of Surrey: 1881 no 142.

<sup>3</sup> SEWELL, Samuel J. The History of Children's and Invalids' Carriages. In: *Journal of the Royal Society of Arts* 71/3694, 1923, p. 720.

<sup>4</sup> *Discovering Dorothy...*

<sup>5</sup> PETHICK LAWRENCE, Frederick W., EDWARDS, Joseph. *The Reformer's Yearbook 1908*. London, Manchester, Reddish, 1908, p. 266.

<sup>6</sup> CREIGHTON, Sean. Croydon's Suffragettes. In: *Croydon Radical History Notes* 1, 2015, p. 4.

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<sup>8</sup> KACZANOWICZ, Marta. The War Years in Thebes. Ernest Mackay's Work in Theban Tombs. In: *The Journal of Egyptian Archaeology*, in press.

<sup>9</sup> Gardiner MSS 19.6.1, 19.8.1–2, 19.11.1–2, 19.14.1–2.

<sup>10</sup> KACZANOWICZ, The War Years..., in press.

<sup>11</sup> General Registry Office (England and Wales). Births in the Sub-district of Clifton in the County of Bristol C.B.: 1914 no 107.

<sup>12</sup> KACZANOWICZ, The War Years..., in press.

took place on September 1, 1916.<sup>13</sup> Two months later, Ernest joined the army and served as a captain in the Royal Army Service Corps in Egypt and Palestine until 1919.<sup>14</sup> Soon the family was struck by a tragedy: Richard died of tuberculous meningitis on April 7, 1917 at the age of two.<sup>15</sup>

### Excavating with Ernest

The war years and those immediately following them constitute blank pages in Dorothy's known biography: her employment by Gardiner apparently did not result in any publications, or even documentation, which could be explicitly attributed to her. Ernest remained in Palestine to conduct an archaeological survey there,<sup>16</sup> but I was unable to verify whether his wife was with him at that time. The situation changed after 1922. In the 1920s, after a rather unfortunate episode in Ernest Mackay's work for the Penn Museum, ending with the abrupt termination of his employment,<sup>17</sup> he began excavating in Iraq, first as a field director of the Oxford University – Chicago Field Museum Expedition to Mesopotamia at Kish. Dorothy was present at Kish from October 1923; in the lists of mission members in subsequent seasons, given by McGuire Gibson in his much later monograph of Kish, she is present, but merely as a “Mrs. Mackay (unofficial)”.<sup>18</sup> Her contribution, however, was substantial: she produced all the line drawings for Ernest's final publication of the site.<sup>19</sup> In March 1925, Dorothy, Ernest and E. Burrows visited the site of Jemdet Nasr and were the first ones to identify the archaeological remains there.<sup>20</sup> Dorothy's account of the visit was published in *The English Review*.<sup>21</sup>

It was during the Mackays' stay in Iraq when Dorothy authored her first book: an archaeological guide entitled *Ancient Cities of Iraq: A Practical Handbook*.<sup>22</sup> As noted by Thornton, in time Dorothy became a communicator of archaeology, with an interest in disseminating archaeological research and “improving the intellectual accessibility of sites to visitors”.<sup>23</sup> The popularity of the handbook can be attested for example by its mention in a memoir by the popular Polish writer Ferdynand Ossendowski, published in 1931: “Od Bagdadu do ruin Babilonu – 54 mile angielskie nikiemnej drogi. Tak twierdzi w swoim przewodniku miss Dorothy Mackay.” (From Baghdad to the ruins of Babylon – 54 English miles of a terrible road. This is what Miss Dorothy Mackay claims in her guidebook.)<sup>24</sup> In 1952, the Arabic translation was released.<sup>25</sup>

<sup>13</sup> General Registry Office (England and Wales). Births in the Sub-district of South Croydon in the County of Croydon C.B.: 1916 no 407.

<sup>14</sup> BIERBRIER, Morris L. *Who Was Who in Egyptology*. London, 2012, p. 348.

<sup>15</sup> General Registry Office (England and Wales). Deaths in the Sub-district of South Croydon in the County of Croydon C.B.: 1917 no 217.

<sup>16</sup> THORNTON, *Archaeologists in Print*, p. 68.

<sup>17</sup> POSSEHL, Gregory L. Ernest J. H. Mackay and the Penn Museum. In: *Expedition* 52/1, 2010, pp. 41–43.

<sup>18</sup> GIBSON, McGuire. *The City and Area of Kish*. Miami, 1973, pp. 174–175.

<sup>19</sup> MACKAY, Ernest. *Report on the Excavation of the “A” Cemetery at Kish, Mesopotamia. Part I*. Chicago, 1925, p. 8.

<sup>20</sup> MACKAY, Ernest. *Report on Excavations at Jemdet Nasr, Iraq*. Chicago, 1931, p. 225; MATTHEWS, Roger J. Defining the Style of the Period: Jemdet Nasr 1926–28. In: *Iraq* 54, 1992, p. 1.

<sup>21</sup> MACKAY, Dorothy. Painted potsherds. In: *The English Review* 45, 1927, pp. 81–89.

<sup>22</sup> MACKAY, Dorothy. *Ancient Cities of Iraq. A Practical Handbook*. Baghdad, 1926.

<sup>23</sup> THORNTON, *Archaeologists in Print*, pp. 68–69.

<sup>24</sup> OSSENDOWSKI, Ferdynand Antoni. *Gasnące ognie: Podróż po Palestynie, Syrii, Mezopotamji*. Poznań: Wydawnictwo Polskie, 1931, p. 250.

<sup>25</sup> MACKAY, Dorothy. *Mudun al-'Iraq al-qadima*. Transl. by Y.J. Miscony. Baghdad: 'Ahd Bagdad, 1952.

Eventually, Ernest was appointed the director of excavations at Mohenjo-Daro (1926) – the famous urban centre of the Indus Valley Civilisation,<sup>26</sup> back then located on the territory of British India (currently Pakistan). Dorothy published extensively on the archaeology of the Indus Valley: among her publications, we find both scholarly papers devoted to particular archaeological problems and articles aiming at publicizing her and Ernest's research (for the full bibliography of Dorothy Mackay see below). Large-scale excavations at Mohenjo-Daro were suspended in 1931;<sup>27</sup> Dorothy and Ernest moved to excavate the site of Chanhu-Daro, located around 130 km to the south.<sup>28</sup> In the report from the 1935–1936 season, Ernest credited Dorothy with preparing most of the line drawings for the book, and added that “she rendered invaluable assistance in recording the many objects brought into the camp”.<sup>29</sup> Ernest's monograph *Early Indus Civilization* was dedicated to his wife.<sup>30</sup>

Despite working as a team, Dorothy and Ernest did not always agree with each other when it came to interpreting the findings. An account of such a scholarly disagreement, here on the subject of ancient political organisation in the Indus Valley, can be found in Sadanand Kashinath Dikshit's *An Introduction to Archaeology*:

Miss [*sic*] Dorothy Mackay says: “Dr. Wheeler has recently investigated ... a central mass of buildings among the ruins of Harappa, which he regards as a citadel and stronghold of a bureaucratic or priest-king regime. At Mohenjo-daro, there is some evidence that the regime was theocracy, very similar in type to the contemporary theocracies of Sumer.” Dr. Mackay himself, however, urged that “a large, straggling building has been discovered which *may have been a palace*”.<sup>31</sup>

From India the Mackays moved back to the well-known territory: in the 1930s Ernest joined his old mentor Flinders Petrie and Margaret Murray to excavate at Tell el-Ajjul in the Gaza Strip. As usual, Dorothy travelled with her husband: a letter written by the archaeologist Olga Tufnell, dated December 11, 1935, contains the following mention: “Much alarums and excursions in the Committee [British School of Archaeology in Egypt] which now consists of Mrs Wheeler (Chairman) elected by Mrs Mackay (who was voted for by Mrs W.) and Miss Murray I suppose”.<sup>32</sup>

At some point before 1939, Dorothy, Ernest and Peter settled in the village of Whiteleaf, Princes Risborough, in a house called Brambledown. In the 1939 national census, Dorothy is described as a “housewife and research worker (B.A., B.Sc.)”.<sup>33</sup>

<sup>26</sup> MACKAY, Dorothy. Finds at Chanhu-Daro. In: *Asia* July, 1937, p. 501.

<sup>27</sup> FÁBRI, Charles Louis (ed.). *Annual Reports of the Archaeological Survey of India for the Years 1930–31, 1931–32, 1932–33 & 1933–34. Part One*. Delhi, 1936, p. 51.

<sup>28</sup> POSSEHL, Ernest J. H. Mackay..., p. 43.

<sup>29</sup> MACKAY, Ernest. *Chanhu-Daro Excavations 1935–36*. New Haven, 1943, p. viii.

<sup>30</sup> MACKAY, Ernest. *Early Indus Civilization*, 2nd edition, enlarged and edited by D. Mackay. London, 1948.

<sup>31</sup> DIKSHIT, Sadanand Kashinath. *An Introduction to Archaeology*. Bombay and Calcutta, 1955, p. 293.

<sup>32</sup> GREEN, John D. M., HENRY, Ros (eds). *Olga Tufnell's "Perfect Journey": Letters and photographs of an archaeologist in the Levant and Mediterranean*. London, 2021, pp. 313–314.

<sup>33</sup> National Archives. 1939 England and Wales Register, E.D. Letter Code DWRG, Wycombe R.D. (Part), Registration District and Sub-district 145/3.

## Assistant keeper at the Ashmolean Museum

In 1940, Dorothy was appointed an assistant keeper at the Department of Antiquities, Ashmolean Museum at Oxford, as a replacement for Donald B. Harden, who joined the Ministry of Supply in September of that year.<sup>34</sup> In fact, in British academia, both world wars opened new professional opportunities for women, who often took over the academic posts of their male colleagues that left to join the military, at least in the fields of archaeology and anthropology.<sup>35</sup> Dorothy and Harden had probably known each other before the war: the latter published some glass finds from Kish, albeit only after Dorothy and Ernest left the expedition for excavation in India.<sup>36</sup>

According to the annual reports of the Ashmolean Museum, Dorothy was working on curating the collection of Coptic textiles and on a list of Egyptian place names and a corresponding map. Her letters exchanged with Percy Newberry, dated between September and December 1941 and currently kept at the Griffith Institute, University of Oxford,<sup>37</sup> confirm this: they contain Dorothy's inquiry about a reproduction of a textile donated by Newberry to the Ashmolean, as well as information on the preparations for an exhibition of Egyptian textiles.<sup>38</sup> In March 1944, Dorothy resigned from her post.<sup>39</sup>

Interestingly, hardly any information on Dorothy's activity at the Ashmolean can be found in places other than the Museum's annual reports. For example, the textiles donated by Newberry to the Ashmolean have attracted considerable attention in recent times, yet I was unable to find no mention of the fact that it was Dorothy Mackay who was responsible for this collection in the 1940s.<sup>40</sup> One of the few mentions of her work at the Ashmolean can be found in Gibson's aforementioned book on Kish: "Mrs. Dorothy Mackay worked for some time in the 1940's for the Museum, trying to put some order in the records after much of the material was lost or destroyed".<sup>41</sup>

## Beirut years

Ernest Mackay died on October 2, 1943,<sup>42</sup> when Dorothy was still working at the Ashmolean. For Dorothy, contrary to many "archaeologist wives" of the period, the death of her husband did not mean the end of her own research. In the 1945 report of the British School of Archaeology in Iraq, there is a mention of a sum of £100, given to "Mrs. Mackay" for her forthcoming book on Palmyra,<sup>43</sup> while in the following year, grants to "Dr. Gurney

<sup>34</sup> HURST, John G. Donald Benjamin Harden (1901–1994). In: *Proceedings of the British Academy* 94, 1997, p. 524.

<sup>35</sup> POPE, Rachel. Processual archaeology and gender politics: The loss of innocence. In: *Archaeological Dialogues* 18/1, 2011, pp. 68–69; LARSON, Frances. *Undreamed Shores: The Hidden Heroines of British Anthropology*. London, 2021.

<sup>36</sup> HURST, Donald Benjamin Harden..., pp. 527–528.

<sup>37</sup> NEWB2/488.1–3, formerly Newberry MSS 1.30.32–34.

<sup>38</sup> KACZANOWICZ, The War Years..., in press.

<sup>39</sup> Alison Roberts, personal communication (March 2023).

<sup>40</sup> For example, in Ruth Barnes' article on the textiles exhibited in various museums (BARNES, Ruth. Textiles and Museum Displays: Visible and Invisible Dimensions. In: *Textile Society of America Symposium Proceedings*, 2014, p. 1 n. 1), one can find information that the Newberry textiles were donated to the Ashmolean in 1946; however, at least the reproduction mentioned in Dorothy Mackay's letter must have been donated earlier.

<sup>41</sup> GIBSON, *The City*..., p. 179.

<sup>42</sup> POSSEHL, Ernest J. H. Mackay..., p. 41.

<sup>43</sup> *British School of Archaeology in Iraq. Report for 1945*, accessed March 10, 2023, <https://bisi.ac.uk/sites/default/files/report%20for%201945.pdf>.

and Mrs. Mackay”, £500 in total, are listed among the expenditures;<sup>44</sup> these probably refer to the same payment. Soon after editing and enlarging the second edition of Ernest’s *Early Indus Civilization* (1948), Dorothy was invited by the American University of Beirut to help reorganise the AUB Museum after the havoc of war. All the objects belonging to the Museum, packed up when the building had been turned into a storage space for “food, athletic equipment and other wartime necessities”,<sup>45</sup> required careful unpacking and rearrangement. Dorothy arrived in Beirut in January 1948 and quickly began working on the Museum’s collection (Fig. 1). Her stay, originally intended to last six months, eventually turned into more than three years of intense work (she left Lebanon in 1951).



**Fig. 1:** Dorothy Mackay 1948–1951 (phot. AUB; originally published in *Outlook* 4 no. 8, 1951)

In Beirut, Dorothy eventually had a chance to not only work with archaeological material but also use her expertise in one of her original degrees: zoology. The museum’s collection was divided into three sections: Archaeological, Geological, and Zoological Galleries, with the last one being “really a still-life zoo”.<sup>46</sup> Additionally, Dorothy produced a new, illustrated guide to the archaeological collection,<sup>47</sup> praised in recent scholarship for its inclusion of Islamic artifacts, which was unprecedented in the Museum’s history.<sup>48</sup>

While in Beirut and afterwards, Dorothy continued her interest in the study of the Indus Valley Civilisation, as attested for example by the presence of her letter to Tom Penniman (the curator at the Pitt Rivers Museum at Oxford) regarding ivories from Mohenjo-Daro and Chanhudaro, dated October 23, 1951, together with her other archival materials currently at the Pitt Rivers Museum archive.<sup>49</sup> To the same museum, she also donated a collection of Ernest’s lantern slides from the two aforementioned sites, and spent a week in 1952 labelling and cataloguing these objects there.<sup>50</sup>

Another donation by Dorothy to the Pitt Rivers Museum included a murex shell from the ruins of a Roman villa south of Beirut.<sup>51</sup>

<sup>44</sup> *British School of Archaeology in Iraq. Report for 1946*, accessed March 10, 2023, <https://bisi.ac.uk/sites/default/files/report%20for%201946.pdf>.

<sup>45</sup> Museum Curator to Bid AUB Adieu. In: *Outlook* 4/8 (1951), p. 1.

<sup>46</sup> Museum Curator..., p. 3.

<sup>47</sup> *Ibidem*.

<sup>48</sup> AUJI, Hala. Tales of Tiles: Shifting Narratives of a Museum’s Islamic Artifacts. In: *Bulletin de correspondance hellénique moderne et contemporain*, 3, 2020, p. 22.

<sup>49</sup> *Penniman Papers*, accessed March 10, 2023, <https://www.prm.ox.ac.uk/penniman-papers>.

<sup>50</sup> *Report of the Curator of the Pitt Rivers Museum (Department of Ethnology) for the year ending 31 July 1952*, accessed March 10, 2023, <http://web.prm.ox.ac.uk/sma/index.php/museum-annual-reports/252-1951-52-annual-report.html>.

<sup>51</sup> HICKS, Dan. Asia and the Middle East. In: D. Hicks and A. Stevenson (eds), *World Archaeology at the Pitt Rivers Museum: A characterization* (pp. 455–470). Oxford, 2013, p. 462.



**Fig. 2:** *Dorothy Mackay's unmarked grave at St Dunstan's churchyard, Monks Risborough* (phot. Peter Godden)

Dorothy Mackay died on February 8, 1953 in St Joseph's Nursing Home, Beaconsfield, of pancreatic cancer. In her death certificate, her profession is given as: "Widow of Ernest John Henry Mackay. Archaeologist";<sup>52</sup> a final acknowledgment of her position as an archaeologist in her own right – though only after giving her status in relation to her husband. Three days later, she was buried at St Dunstan's churchyard, Monks Risborough, in what is now an unmarked grave (Fig. 2).<sup>53</sup>

## Conclusion

"After devoting almost 40 years of her life to archaeological studies in Egypt, Iraq and India, Mrs. Dorothy Mackay, the present curator of the AUB Museum, will be leaving for her home in England in June", reads the notice issued upon her leaving from Beirut by the AUB.<sup>54</sup> However, despite dedicating almost half a century to research, becoming one of few women of similar academic accomplishments at that time, she remains practically unknown among professional archaeologists nowadays.

<sup>52</sup> General Registry Office (England and Wales). Deaths in the Sub-district of Amersham in the County of Buckingham: 1953 no 350.

<sup>53</sup> Plot 146/1 (Peter Godden, personal communication, March 2023).

<sup>54</sup> Museum Curator..., p. 1.



In fact, having obtained her BA degree in 1902, she was one of the first women in England to do so.<sup>55</sup> Her pursuit of higher education had started long before she met Ernest, though her engagement in archaeological research clearly dates from after the two got married. Despite not having obtained formal archaeological training, Dorothy formulated her own opinions on the excavated material and eventually published her papers in such renowned archaeological journals as *Antiquity* (1944, 1945). She continued her research until the very end. Even though she was survived by a son, much of the information on her life was lost after his premature death, when the Mackay family emigrated to Canada. According to Mrs Adele Mackay (widow of Dorothy and Ernest's grandson Richard), in the family archive was correspondence between the Mackays and other prominent archaeologists of the time, such as T.E. Lawrence and Max Mallowan, as well as archaeological notes, including those in Dorothy's handwriting. The majority of these had to be sold during Peter Mackay's lengthy illness. Hopefully, these documents will come to light one day and allow more details to be added to Dorothy Mackay's extraordinary life story.

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<sup>55</sup> In 1878, UCL was the first British university to award degrees to women (HARTE, Negley, NORTH, John, BREWIS, Georgina (eds). *The World of UCL*. London, 2018, p. 89).

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## Underground tourist routes as an element of Poland's cultural heritage

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### *Underground tourist routes as an element of Poland's cultural heritage*

Underground tourist routes respond to current trends in museum development. They can be treated as interactive exhibitions focused primarily on the visitor. Former underground mines are also important elements of cultural heritage. They preserve mining equipment and traces of mining techniques. Through interactivity they can perform an educational function, presenting mining memorabilia and customs. Underground routes are also tourist destinations, attracting a significant number of visitors. The present study covered eight routes located in different regions of Poland. Their tourist value was assessed and tourists were asked to complete a survey regarding the routes. The significance of the mining heritage was described and evaluated. On this basis, the strengths and weaknesses of the underground mine routes as places of presentation of cultural heritage were identified. The sites surveyed are characterised by their high potential but the level of awareness and tourist use is not high. The underground routes with the highest cultural heritage value are also those with high tourist potential.

Keywords: mining heritage, geotourism, education, interactive exhibitions

## Introduction

One important component of local cultural heritage, specifically that related to industrial activities, is the remains of mineral exploitation.<sup>1</sup> There are aspects of mining heritage that can be used for tourism.<sup>2</sup> Cultural heritage encompasses the historical tangible and intangible heritage of humanity. In addition to traditions and customs (e.g., celebration of festivals, superstitions, religious practices), intangible heritage can include industrial production methods.<sup>3</sup> Cultural heritage encompasses a coherent symbolic layer determined by the way it is interpreted, which, together with the material aspects, can become the basis for creating a marketable tourism product. Nowadays, the aim of protecting cultural resources is seen more broadly. It is not only about conservation and protection of the values represented by the sites, it also relates to (sustainable) use in the process of local development.<sup>4</sup> Mining heritage represents historical, technological, scientific, architectural and social values.<sup>5</sup>

The mining industry is an important sector of the economy, but the material remains of mining activities have long been seen as unattractive elements of the landscape.<sup>6</sup> In recent years, the way mining history is perceived has changed; old mines are increasingly seen as cultural heritage sites to be protected and made accessible to tourists. This has been the case, for example, with resource extraction in Wales and Cornwall, where mining activities have left a significant and lasting mark on the local culture and identities. Mining heritage is characterised by material and cultural authenticity, performativity, and the inclusion of visitors actively participating in learning about the exhibition.<sup>7</sup>

The use of a post-mining area for tourism requires preparation. This should include a planned and professional selection of those elements that should be preserved and protected in order to preserve the mining heritage of the site.<sup>8</sup> In recent years, intensive efforts have been taking place to adapt further historic underground spaces for use. The process of revitalising historic underground mines is not easy, as it often requires restoring accessibility to disused

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<sup>2</sup> RUIZ-BALLESTEROS, Esteban, RAMÍREZ, Macarena, H. Identity and community—Reflections on the development of mining heritage tourism in Southern Spain. In: *Tourism management*, 28 (3), 2007, pp. 677-687; JELEN, Jakub. Mining heritage and mining tourism. In: *Czech Journal of Tourism*, 7 (1), 2018, pp. 93-105; KIMIC, Kinga, SMANIOTTO COSTA, Carlos, NEGULESCU, Mihaela. Creating Tourism Destinations of Underground Built Heritage—The Cases of Salt Mines in Poland, Portugal, and Romania. In: *Sustainability*, 13 (17), 2021, 9676, <https://doi.org/10.3390/su13179676>.

<sup>3</sup> COUPLAND, Bethan, COUPLAND, Nicolas. The authenticating discourses of mining heritage tourism in Cornwall and Wales. In: *Journal of Sociolinguistics*, 18 (4), 2014, pp. 495-517.

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<sup>5</sup> COLE, Denise. Exploring the sustainability of mining heritage tourism. In: *Journal of Sustainable Tourism*, 12 (6), 2004, pp. 480-494.; MIKOS VON ROHRSCHEIDT, Armin. *Turystyka kulturowa. Fenomen, potencjał, perspektywy*. Gniezno: Wydawnictwo GWSHM Milenium, 2008.

<sup>6</sup> FRAGNER, Benjamin, ZIKMUND, Jan. *Co jsme si zbořili. Bilance mizějící průmyslové ery/ deset let (What we have destroyed. The Balance of the Dying Industrial Age/Ten Years)*. Prague: ČVUT, 2009, ISBN 978-80-01-04387-5.

<sup>7</sup> COUPLAND, Bethan, COUPLAND, Nicolas. The authenticating discourses of mining heritage tourism in Cornwall and Wales. In: *Journal of Sociolinguistics*, 18 (4), 2014, pp. 495-517.

<sup>8</sup> JELEN, Jakub. Mining Heritage..., p. 955.

and degraded facilities in order to prepare an interesting and safe tourist route. Underground tourist routes contribute to the dissemination of the cultural heritage of past generations and the historical education of society and local development.<sup>9</sup>

Academics are paying increasing attention to the growing tourist interest in post-mining heritage.<sup>10</sup> The problems of inventorying sites, adapting them for tourism purposes, assessing their value, and ensuring sites are safe and secure have all come under scrutiny.<sup>11</sup> It has been pointed out that the cultural heritage value of post-mining sites is the basis for the inscription of many such sites on the UNESCO World Heritage List. These include Zollverein mine (Ruhr area, Germany), the Big Pit mine (England) and many others.<sup>12</sup> Surveys indicate that post-mining tourist routes are perceived as tourist attractions.<sup>13</sup>

The term ‘mining tourism’ relates to cultural tourism based on mining heritage, its authenticity, the protection of its values and the interpretation of its meaning.<sup>14</sup> It is also often seen as a type of geotourism.<sup>15</sup> The aim of mining tourism is to explore abandoned mines, the remnants of mining activities and mining heritage in order to preserve cultural and historical knowledge and use them in tourism.<sup>16</sup> “According to Kršák et al., “Mining tourism combines industrial, technological, cultural and ethnographic heritage into a cognitively-oriented, educational and experiential form of tourism””.<sup>17</sup> Geotourism involves the conscious exploration of the Earth’s heritage, its abiotic elements and those aspects of human activity that relate to the use of these planetary resources. It constitutes a type of cognitive, nature-based and sustainable tourism which takes place in the field and focuses on geological, geomorphological

<sup>9</sup> WIEJA, Tomasz, CHMURA, Janusz, BARTOS, Maciej. Underground tourist routes in the context of sustainable development. In: *Archives of Mining Sciences*, 60 (3), 2015, pp. 859–873.

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<sup>13</sup> RÓŻYCKI, Paweł, DRYGLAS, Diana. Mining tourism, sacral and other forms of tourism practiced in antique mines—Analysis of the results. In: *Acta Montanistica Slovaca*, 22 (1), 2017, pp. 58–66; JAGIELŁO, Anna. Ocena kierunków adaptacji podziemnych obiektów pogórnictwa w odniesieniu do ich atrakcyjności turystycznej. In: *Technical Issues*, 2, 2015, pp. 16–23.

<sup>14</sup> SCHEJBAL, Ľirad. Montánni turismus (Mining tourism). Ostrava: Technical University of Ostrava, 2016.

<sup>15</sup> HOSE, Thomas. A. 3 G’s for modern geotourism. In: *Geoberitage*, 4, 2012, pp. 7–24.

<sup>16</sup> SCHEJBAL, Ľirad. Montánni turismus (Mining tourism). Ostrava: Technical University of Ostrava, 2016; JELEN, Jakub. Mining heritage and mining tourism...

<sup>17</sup> KRŠÁK, Branislav, SIDOR, Csaba, STRBA, Lubomir, MOLOKÁČ, Mário, HVIZDÁK, Ladislav, BLISTAN, Peter, KOEVEKOVÁ, Gabriela, LIPTÁKOVÁ, Erika, DELINA, Radoslav, MÉŠÁROŠ, Peter. Maximizing the potential of mining tourism through knowledge infrastructures. In: *Acta Montanistica Slovaca*, 20 (4), 2015, pp. 319–325.

and landscape features.<sup>18</sup> At the same time, geotourism is strongly linked to cultural tourism because in many cases abiotic elements are accompanied by cultural sites or evidence of human activity related to the exploitation, processing and use of these resources.<sup>19</sup> In situ conservation of mining heritage enables a holistic approach to interpreting the past.<sup>20</sup> Mining remains are not only preserved but also studied and documented, and rescued and reinterpreted. Jones and Munday<sup>21</sup> argue that mining heritage sites should be maintained not only as a place for the preservation of mining artefacts but also of a wide range of intangibles.

In Poland, as elsewhere, the issue of tourism involving post-mining sites is being addressed. P. Zagożdżon and K. Zagożdżon studied geotourism attractions which include underground sites.<sup>22</sup> The authors drew attention to the ever-increasing interest in geotourism in Poland which may eventually lead to more such facilities being made available. They also pointed out problems connected with the tourist offer, such as a lack of adequate promotion and preparation of high quality geotourism products. A number of studies deal with the description of underground routes in Poland, including Złoty Stok, Kowary, Kletno,<sup>23</sup> Tarnowskie Góry silver mine,<sup>24</sup> Krzemionki Opatowskie<sup>25</sup> and chalk tunnels in Chelm.<sup>26</sup> For some sites, the authors note that the geotourism offer is insufficiently developed.

As defined by ICOM: ““A museum is a not-for-profit, permanent institution in the service of society that researches, collects, conserves, interprets and exhibits tangible and intangible heritage. Open to the public, accessible and inclusive, museums foster diversity and sustainability””.<sup>27</sup> In Poland, a museum is a not-for-profit organisational unit whose purpose is to collect and permanently protect the natural and cultural heritage of mankind of a tangible and intangible nature, to inform the public about the values and contents of the collected

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<sup>18</sup> DOWLING, Ross K. Geotourism's global growth. In: *Geoberitage*, 3 (1), 2011, pp. 1-13; HOSE, Thomas. A. 3 G's for modern geotourism. In: *Geoberitage*, 4, 2012, pp. 7-24; MIGOŃ, Piotr. *Geoturystyka*. Warszawa: Wydawnictwo PWN, 2012.

<sup>19</sup> GORDON, John E. Geoheritage, Geotourism and the Cultural Landscape: Enhancing the Visitor Experience and Promoting Geoconservation. In: *Geosciences*, 8 (4), 2018, 136, <https://doi.org/10.3390/geosciences8040136>

<sup>20</sup> EDWARDS, J. Arwel, LLURDÉS COIT, Joan Carles. Mines and quarries: Industrial heritage tourism. In: *Annals of Tourism Research*, 23 (2), 1996, pp. 341-363; DICKS, Bella. The view of our town from the hill: Communities on display as local heritage. In: *International Journal of Cultural Studies*, 2 (3), 1999, pp. 349-68.

<sup>21</sup> JONES, Calvin, MUNDAY, Max. Blaenavon and United Nations World Heritage Site status: Is conservation of industrial heritage a road to local economic development? In: *Regional Studies*, 35 (6), 2001, pp. 585-90.

<sup>22</sup> ZAGOŹDŹON, Paweł, P., ZAGOŹDŹON, Katarzyna. Podziemne obiekty geoturystyczne na terenie Polski. In: *Hereditas Minariorum*, 3, 2016, pp. 267279.

<sup>23</sup> ZAGOŹDŹON, Paweł, P., ZAGOŹDŹON, Katarzyna. Udostępnione pogórnice obiekty podziemne Dolnego Śląska jako zaplecze geoturystyczne. In: *Przegląd Geologiczny*, 61 (1), 2013, pp. 19-24; BORZEŹCKI, Robert, WÓJCIK, Dariusz, KALISZ, Maciej. Pozostałości górnictwa rud uranu i żelaza w rejonie Kowar. Część II. In: *Hereditas Minariorum*, 5, 2018, pp. 51-84.

<sup>24</sup> DZIĘGIEL, Marian. Podziemne trasy turystyczne w Tarnowskich Górach (Górny Śląsk). In: *Geoturystyka*, 4 (15), 2008, pp. 51-62; DZIĘGIEL, Marian. The geotouristic attractiveness of the underground trails in Zabrze, Dąbrowa Górnicza and Tarnowskie Góry towns (Silesian Upland). In: *Geotourism*, 17 (1-2), 2020, [https://doi.org/10.7494/geotour.2020.1-2\(60-61\).23](https://doi.org/10.7494/geotour.2020.1-2(60-61).23).

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<sup>26</sup> CHYLIŃSKA, Dagmara, KOSMALA, Gerard. Turystyka miejska schodzi pod ziemię. Rola piwnic i podziemi w turystyce – zarys zagadnienia. In: *Turystyka kulturowa*, 6, 2018, pp. 25-43.

<sup>27</sup> ICOM. *International Council of Museums*, accessed August 28th, 2023, <https://icom.museum/en/resources/standards-guidelines/museum-definition/>

collections, to disseminate the fundamental values of Polish and world history, science and culture, to shape cognitive and aesthetic sensitivity, and to enable the use of the collections.<sup>28</sup>

There has been longstanding growth in the number of museums and visitors around the world. Reasons for this include globalisation, rising living standards, the IT revolution, the development of tourism, and the intensive promotion of museums.<sup>29</sup> The future character of museum facilities (apart from financial factors) will be shaped by the expectations of visitors and the media (press, radio, television, internet, social networks). In 2001, there were 656 museum facilities in Poland, which were visited by 15 million people. In 2021, there were already 939 museums, 70.5% of which were in the public sector. They were visited by 25.3 million people. The total number of museum collections was 20.1 million pieces. Museum artefacts in the field of archaeology (25.2%) predominated, with the smallest numbers from the fields of geology (0.2%) and cartography (0.2%).<sup>30</sup>

Museums have long ceased to be temples of art visited by a few connoisseurs. They must now perform as multifunctional cultural centres that make their resources available and widely disseminate knowledge about them. At the same time, museums organise various artistic, cultural and scientific events (temporary exhibitions, concerts, performances, shows, lectures, seminars).<sup>31</sup> There has been a gradual shift away from traditional forms of museum presentation towards interactivity, using the latest multimedia technologies (film, music, multimedia installations, visualisations), original exhibits and photographs, or interactive forms of presentation (scenography, replicas, mock-ups that everyone can touch) to present material. This approach enables direct contact with the exhibition, engaging all the visitor's senses (sight, hearing, smell, taste), engaging them in active visiting and self-education. Museum resources are also made available for viewing online, via virtual museums or exhibitions.<sup>32</sup> The COVID-19 pandemic led to a particularly intensive development of this form of dissemination. Contemporary museums are increasingly audience-centred.<sup>33</sup>

Underground tourist routes can be classified as interactive museums and exhibitions. They are viewer-oriented, so as to convey as much as possible to visitors in an interesting and engaging way. They interact with the various human senses and encourage the visitor to be active and involved.

The aim of this research is to assess underground mining tourist routes as an element of cultural heritage and tourist attractions. Some are open-air museums of technology, others archaeological museums or active mines. An attempt was made to assess the cultural and geotouristic value of selected underground routes made available to tourists. This allowed

<sup>28</sup> *Ustawa z dnia 21 listopada 1996 r. o muzeach*. Dziennik Ustaw nr 5, poz. 24, tekst jedn. Dz. U. 2022 poz. 385.

<sup>29</sup> POMIAN, Krzysztof. Kilka myśli o przyszłości muzeum. In: *Muzealnictwo*, 55, 2014, pp. 7–11; FOLGAN-JANUSZEWSKA, Dorota. History of the museum concept and contemporary challenges: introduction into the debate on the new ICOM museum definition. In: *Muzealnictwo*, 61, 2020, pp. 37–59.

<sup>30</sup> Statistics Poland. Activity of museums in 2021, accessed August 28th, 2023, <https://stat.gov.pl/en/topics/culture-tourism-sport/culture/activity-of-museums-in-2021,8,5.html>

<sup>31</sup> POMIAN, Krzysztof. Kilka myśli o przyszłości muzeum. In: *Muzealnictwo*, 55, 2014, pp. 7–11.

<sup>32</sup> STEFANIK, Magdalena, KAMEL, Marta. Muzea i wystawy interaktywne w Polsce – współczesna atrakcja turystyczna. In: *Turystyka Kulturowa*, 8/2013, 2013, pp. 5–23.

<sup>33</sup> JANCOVICH, Leila. Breaking down the Fourth Wall in Arts Management: The Implications of Engaging Users in Decision-Making. In: *International Journal of Arts Management*, 18(1), 2015, 14–28; AYALA, Inigo, CUENCA-AMIGO, Macarena, CUENCA, Jaime. The Future of Museums. An Analysis from the Visitors' Perspective in the Spanish Context. In: *The Journal of Arts Management, Law and Society*, 51(3), 2021, pp. 171–187, <https://doi.org/10.1080/10632921.2021.1901813>

for a comprehensive assessment of the potential of these sites, indicating their strengths and weaknesses. The study aims to take a comprehensive look at the use of tourism to promote post-mining heritage in Poland.

## Post-mining cultural heritage in Poland

Cultural heritage is defined in legal acts, international treaties and national documents. The most important international document is the convention concerning the Protection of World Cultural and Natural Heritage, approved at the UNESCO General Conference in Paris, 1972. At the national level, cultural heritage is formally defined in different ways by different countries. There is no defined concept of cultural heritage in Polish law. According to the Act on the Protection and Care of Monuments,<sup>34</sup> a monument is “an immovable or movable object, parts or complexes thereof, being a work of man or connected with his activity, constituting a testimony of a bygone era or event, the preservation of which is in the public interest due to its historical, artistic or scientific value”. Cultural heritage is reflected in the cultural landscape,<sup>35</sup> which is defined as “the space perceived by people, containing natural elements and products of civilisation, historically shaped by natural factors and human activities”.

Cultural heritage, in both its material and non-material elements, may be subject to legal protection. Immovable monuments such as cultural landscapes and technical sites, including mines, are subject to protection and care regardless of their state of preservation. Monuments can be protected by entry into the register of monuments, entry into the Heritage Treasures List, recognition as a monument of history, the establishment of a cultural park, and the establishment of protection in the local spatial development plan or through a Decision on the Conditions of Development and Land Use.<sup>36</sup>

Among the 123 historical monuments in Poland, there are several sites related to the exploitation of mineral resources. These are mainly technical sites: the Bochnia salt mine (which has been on Poland's List of Historical Monuments since 2000); Bóbrka, Poland's oldest oil mine (2019); Tarnowskie Góry, the underground part of a historic silver ore mine and the “Black Trout” adit (2004); Wieliczka salt mine (1994); Zabrze, a complex of historic coal mines (2020); and an archaeological site at Krzemionki Opatowskie, near Ostrowiec Świętokrzyski, which encompasses flint mines from the Neolithic period (1994).<sup>37</sup> A historical monument can be an site that represents universal values and has exceptional significance.<sup>38</sup> It represents the highest and most prestigious form of protection. The fact of being recognised as a historic monument should strengthen the process of building awareness among the authorities and within the local community, as well as assisting the site's branding and promotion.

One of the most attractive tourist sites in Poland is Wieliczka salt mine. Its importance stems from its rich history, its cultural and educational value, and its distinctive physical properties – it is the only underground spa in Poland, and its waters are used for treatment. In 1978, it was

<sup>34</sup> *Ustawa z dnia 17 września 2003 r. o ochronie zabytków i opiece nad zabytkami*. Dziennik Ustaw nr 162/2003, poz. 1568, tekst jedn. Dz. U. 2022 poz. 840.

<sup>35</sup> TOST, Michael, AMMERER, Gloria, KOT-NIEWIADOMSKA, Alicja, GUGERELL, Katharina. Mining and Europe's World Heritage Cultural Landscapes. In: *Resources*, 10 (2), 2021, 18, <https://doi.org/10.3390/resources10020018>

<sup>36</sup> *Ustawa z dnia 17 września 2003 r. o ochronie zabytków i opiece nad zabytkami*. Dziennik Ustaw nr 162/2003, poz. 1568, tekst jedn. Dz. U. 2022 poz. 840.

<sup>37</sup> *Pomniki historii*, accessed March 13th, 2023, <https://nid.pl/pomniki-historii>

<sup>38</sup> MARCINEK, Roman. *Pomniki historii. Najcenniejsze obiekty i zespoły zabytkowe w Polsce*. Warszawa: Narodowy Instytut Dziedzictwa, 2019.

among the 12 sites and objects placed on the first UNESCO World Heritage List.<sup>39</sup> Its presence on this prestigious list confirms the universal value and global significance of the mine, and also represents a commitment to its preservation. Salt exploitation started in the thirteenth century. The mine has nine levels and 360 km of galleries, with statues and altars carved in salt. In 2022, 1.1 million visitors from 179 countries visited the mine.<sup>40</sup> In 2013, the UNESCO listing was extended to include the Bochnia salt mine and the Saltworks Castle in Wieliczka, renaming it the Royal Salt Mines in Wieliczka and Bochnia. The UNESCO World Heritage List also includes the following mining sites located in Poland: Tarnowskie Góry lead, silver and zinc mine and its underground water management system, and Krzemionki Prehistoric Striped Flint Mining Region.<sup>41</sup>

In Poland, the National List of Intangible Cultural Heritage was created as a result of the inventory of manifestations of this type of heritage under the 2003 UNESCO Convention for the Safeguarding of the Intangible Cultural Heritage. There are currently 64 entries on the list, including two related to mineral exploitation: Barbórka of the Coal Miners of Upper Silesia (2018) and Barbórka of the Coal Miners of Lower Silesia (2022). St Barbara's Day is an annual festive gathering of the professional group of miners and is an integral part of the cultivation of the miner's identity. Of particular importance in Lower Silesia, following the closure of the mines in the 1990s, today's St Barbara's Day in Walbrzych is an expression of continuity in preserving local cultural heritage and nurturing the miner's identity, and refers to events in the past that can no longer be continued in their original form. The tangible element of this heritage, supporting the preservation of the intangible one,<sup>42</sup> is the Stara Kopalnia Science and Art Centre, which was opened in 2014 on the site of the historic Julia coal mine in Walbrzych.<sup>43</sup> The facility encompasses a wide range of museum and educational offerings. Visitors can tour the coal face and learn about coal mining methods and techniques (Figure 1). The Old Mine is one of the region's most popular attractions. The Polish Tourist Organisation awarded it the Best Tourism Product of Poland 2022 certificate.<sup>44</sup> The Polish Tourist Organisation also awarded its Gold Certificate to Guido mine and Queen Luisa Adit, which are part of the Coal Mining Museum. Previously, the gold mine in Złoty Stok (2015) and the historical silver mine in Tarnowskie Góry (2019) were awarded this certificate.<sup>45</sup>

There are 71 underground tourist routes in Poland in 2023. They operate in natural caves (19 sites) and sites related to human activity: former mines (20 sites), military sites (16), religious sites (5) and urban sites (11). Most of the tourist routes in the accessible mines are located in southern Poland – in Lower and Upper Silesia and in Lesser Poland (16) (Figure 2). Half of the tourist routes (10) are made available in former mines related to metal ore mining (e.g., uranium, gold, silver). Underground excavations are also made available in former coal mines (4), rock salt mines (3 – including one maintaining the process of exploitation of the raw material) and historical rock mines (3).

<sup>39</sup> UNESCO. *World Heritage Convention*, March 12th, 2023, <https://whc.unesco.org/en/statesparties/pl/>

<sup>40</sup> *Kopalnia Wieliczka. Turysci w kopalni w 2022*, accessed March 11th, 2023, <https://www.kopalniawieliczka.eu/turysci-w-kopalni-w-2022/>

<sup>41</sup> UNESCO. *World Heritage Convention*, accessed March 12th, 2023, <https://whc.unesco.org/en/statesparties/pl/>

<sup>42</sup> *Stara Kopalnia. Centrum Nauki i Sztuki*, accessed February 4th, 2023, <http://www.starakopalnia.pl>

<sup>43</sup> KONIOR, Agnieszka. *Zarządzanie dziedzictwem kulturowym w kontekście rewitalizacji obszarów poprzemysłowych*. Kraków: Wydawnictwo Attyka, 2021.

<sup>44</sup> *Stara Kopalnia. Centrum Nauki i Sztuki*, accessed February 4th, 2023, <http://www.starakopalnia.pl>

<sup>45</sup> *Polska Organizacja Turystyczna*, accessed March 9th, 2023, <https://www.pot.gov.pl>





Fig. 1: Historic equipment at the Old Mine Science and Arts Centre (Photograph: W. Zglobicki)



Fig. 2: Underground mining tourist routes. Studied sites: 1 – Chalk tunnels in Chelm; 2 – Silver mine in Tarnowskie Góry; 3 – Krzemionki Opatowskie; 4 – Gold mine in Złoty Stok; 5 – Guido mine in Zabrze; 6 – Uranium mine in Kletno; 7 – Podgórze mine in Kowary; 8 – Kłodawa salt mine.

## Methods

The author's geotourism assessment was developed based on a set of criteria previously used by other researchers.<sup>46</sup> The study included eight sites characterised by a similar size and intensity of tourist traffic. For this reason, the Wieliczka salt mine (a UNESCO first-listed site and a world-class attraction for many years) was excluded from the study. The aim of the assessment was to determine the value of the sites, making it possible to rank them and identify those most attractive to tourists. Finally, it was possible to identify the strengths and weaknesses of the routes, which in turn makes it possible to take measures to improve their offer.

Two categories were distinguished: scientific–didactic value (main values) and functional–tourist value (additional values). Each of these values encompasses specific criteria; there are 13 in total, set out in Table 1). A graded scale was used (0–2, where 2 is the highest score). The maximum number of points that a site could receive was 26: 12 for its scientific and educational value and 14 for its functional–touristic value.

The category of scientific and educational value contains six criteria (Table 1). It was assumed that these are the main benefits and the most important for this assessment. The functional–tourist category is broken down into seven criteria. The assessment was carried out independently by three experts and the final assessment was the result of consensus. All those who participated in the assessment had experience of this type of development. They also visited all of the investigated underground routes.

The next step was to juxtapose the tourism benefits of the studied sites with their cultural heritage benefits. An expert assessment of the cultural heritage value was also undertaken by the authors. Sites were evaluated according to five criteria: uniqueness of heritage, authenticity of the site, expositions, tangible heritage and accompanying intangible heritage. As before, measurement was according to a three-grade scale.

An internet survey was also carried out. The main task of the questionnaire was to check knowledge of the sites. Respondents were asked to rate the tourist value of the underground routes. The survey was created using Google Forms and was made available on the internet through several outlets, including geotourism/tourist groups on social media (e.g., the Facebook groups “Geotourism – Lower Silesia” and “Tourism”) in late May and early June 2022. The survey contained 13 questions.

<sup>46</sup> DMYTROWSKI, Piotr, KICIŃSKA, Anna. Waloryzacja geoturystyczna obiektów przyrody nieożywionej i jej znaczenie w perspektywie rozwoju geoparków. In: *Problemy Ekologii Krajobrazu*, 29, 2011, pp. 11-20; BRILHA, José. Inventory and Quantitative Assessment of Geosites and Geodiversity Sites: a Review. In: *Geoh Heritage*, 8, 2016, pp. 119–134, DOI 10.1007/s12371-014-0139-3; GAJEK, Grzegorz, ZGŁOBICKI, Wojciech, KOŁODYŃSKA-GAWRYŚIAK, Renata. Geoeducational Value of Quarries Located Within the Malopolska Vistula River Gap (E Poland). In: *Geoh Heritage*, 11, 2019, pp. 1335-1351; CHROBAK, Anna. Przegląd metod waloryzacji obiektów przyrody nieożywionej wykorzystywanych w geoturystyce. In: *Prace Komisji Geografii Przemysłu Polskiego Towarzystwa Geograficznego*, 35 (3), 2021, pp. 116–145.

**Tab. 1:** *Criteria for the assessment of underground tourist routes*

	Criteria	Point value
Scientific and educational value	<b>Scientific knowledge</b>	
	No publication	0
	Single publications (1-3)	1
	Significant number of publications (>4)	2
	<b>Uniqueness of the facility</b>	
	Site of regional importance	0
	Site of national importance	1
	Site of international importance	2
	<b>Diversity</b>	
	One visible feature/process	0
	Two visible features/processes	1
	Three or more visible features/processes	2
	<b>Possibility of workshops/lessons for students</b>	
	No possibility	0
	Workshops may be held	1
	Extensive range of workshops	2
	<b>Educational products</b>	
	Lack of educational products	0
	Individual educational products	1
	Significant number of educational products (e.g., leaflets, multimedia displays, maps)	2
<b>Legibility of features</b>		
Features readable only by specialists	0	
Features readable by secondary school and university students	1	
Features readable by all tourists	2	

Functional and tourist value	<b>Number of tours (capacity)</b>	
	Only one	0
	Two	1
	Three or more	2
	<b>Ticket prices (normal ticket)</b>	
	Over 50 PLN	0
	30–50 PLN	1
	Under 30 PLN	2
	<b>Accessibility (distance from national roads)</b>	
	Location of the facility beyond 10 km	0
	Location of the facility within 5 km	1
	Location of the facility less than 5 km away	2
	<b>Presence of other tourist attractions</b>	
	No tourist attractions within 10 km	0
	Up to 2 tourist attractions within 10 km	1
	More than 3 tourist attractions within 10 km	2
	<b>Presence of supporting infrastructure – car parks</b>	
	Further away than 500 m	0
	At a distance of less than 500 m	1
	Parking facilities directly adjacent to the site	2
	<b>Routes website and social media</b>	
	The website provides basic information about the facility. No social media profiles	0
	The website contains basic information about the facility. There are social media profiles, i.e., Facebook, Instagram	1
	The website includes extensive information about the facility, multimedia resources, a map of the facility. There are social media profiles, i.e., Facebook, Instagram	2
<b>Additional activities on the premises (e.g., boat trips, train rides)</b>		
None	0	
1 additional attraction	1	
More than 1 additional attraction	2	

## Cultural heritage of selected sites

### Chalk tunnels in Chelm

Chelm is located in eastern Poland, in the Lublin Province (Figure 2). The reason for underground exploitation was chalk. The first records of chalk mining in Chelm date back to the Middle Ages, and the sixteenth and seventeenth centuries saw intensive development

of its exploitation. In 1974, a c. 1.5 km long tourist route was opened to the public.<sup>47</sup> Twenty years later, the mine was entered in the register of monuments of the Lublin Province. As a result of the preservation works carried out, the pits' original character has mostly been lost. The few unchanged pavements with a clear relief showing how the walls were worked with pickaxes, niches relieving the ceilings, mining faces, or cavities for caving are a unique record of underground chalk-mining activity, the only such mine in Europe. The mine has been awarded many prizes, and in 2006 it received a Certificate "for "Best Tourist Product""<sup>48</sup>

### Silver mine in Tarnowskie Góry

Town of Tarnowskie Góry is located within the Silesian Province (Figure 2). The tradition of mining in the area, recorded on numerous archaeological sites, dates back to the third century CE. The first written records from the twelfth century inform about prospectors and silver miners operating in the area. The mine was exploited for lead, silver and zinc ores. The discovery of rich deposits of lead and silver ores in the sixteenth century led to an intensive boom in mining activity. Tarnowskie Góry grew to become one of the largest lead and silver mining centres in this part of Europe. Bullion mining at the beginning of the twentieth century began to disappear due to depletion of resources. In 1922 the last mine was closed.<sup>49</sup> The Historic Silver Mine was opened to the public in 1976. The accessible route is about 1,740 m long.<sup>50</sup> Tourists have the opportunity to see, authentic, perfectly preserved mine faces and galleries, mining chambers, and equipment of the historic mine. In addition, visitors to the mine site can take a train ride and visit the Open-air Museum of Steam Machines<sup>51</sup> or Halda popluczkowa Cultural Park.

### Krzemionki Opatowskie

The archaeological museum and reserve Krzemionki Opatowskie is located in the Świętokrzyskie Voivodship (Figure 2). A unique raw material was mined here – striped flint. Mining activity lasted from the Neolithic to the Early Bronze Age (3900–1600 BCE). Approximately 5,000 mine shafts were inventoried here. The flint was used to make axes, knives and sickles. The miners' engineering mastery is evidenced by the excellently preserved different types of pits – from simple, very shallow pits and niches with galleries to sophisticated mine systems with pillar chambers and, eventually, chamber arrangements (Figure 3).<sup>52</sup> The area covered by Neolithic strip flint mining is also a unique, complete and perfectly preserved example of a prehistoric cultural landscape with a mining and industrial character, with post-mining pits and dumps and the remains of flint workshops.<sup>53</sup> Unique on a European scale, the oldest mine in Poland, was opened to tourists in 1985. It was the first tourist route in the world

<sup>47</sup> GOŁUB, Stanisław. Podziemia kredowe w Chelmie – zarys historii eksploatacji górniczej. In: *Materiały 43. Sympozjum Speleologicznego*, Kraków, 2009, pp. 34–36.

<sup>48</sup> *Podziemia Kredowe w Chelmie*, accessed January 7th, 2023, <https://podziemiakredowe.com.pl>

<sup>49</sup> DZIĘGIEL, Marian. Podziemne trasy turystyczne w Tarnowskich Górach (Górny Śląsk). In: *Geoturystyka*, 4 (15), 2008, pp. 51–62.

<sup>50</sup> KOWOL, Magdalena, RÓŻYCKI, Paweł. Turystyka przemysłowa w Tarnowskich Górach. In: *Geoturystyka*, 3, 2008, pp. 41–48.

<sup>51</sup> *Kopalnia Srebra. Zabytkowa Kopalnia Srebra i Sztolnia Złotego Pstrąga*, accessed February 13th, 2023, <https://kopalniasrebra.pl/>

<sup>52</sup> BĄBEL, Jerzy, Tomasz. *Krzemionki. Pomnik historii, rezerwat, muzeum. Prahistoryczne kopalnie krzemienia pasiastego*. Warszawa: Eneteia, 2013.

<sup>53</sup> UNESCO. *World Heritage Convention*, accessed February 21st, 2023, <https://whc.unesco.org/en/list/1599>

presenting underground mines from the Stone Age. An exposition corridor hollowed out in solid limestone with specially prepared “windows” leads around the mine. The Prehistoric Striped Flint Mining Region has been on the UNESCO World Heritage List since 2019.<sup>54</sup>



**Fig. 3:** *Underground galleries in Krzemionki Opatowskie* (Photograph: W. Zgłobicki)

### Gold mine in Złoty Stok

Złoty Stok is located in southwest Poland, in the Lower Silesian Province (Figure 2). The richest ore mineral in the deposit is leingite with up to 40% arsenic content. An important metal for which the area is famous and was of interest to explorers was gold.<sup>55</sup> Exploitation was carried out through a system of shafts and adits. Heaps, funnels, buried and collapsed shallow shafts, galleries and chambers remain after the mining activities.<sup>56</sup> The mining works ceased in the early 1960s and an attempt was made at that time to create an underground tourist route. The site was finally developed in 1996.<sup>57</sup>

There are two adits open to tourists: Upper Black Adit, from which a well-preserved complex of fifteenth- and sixteenth-century excavations and galleries can be observed, and Gertruda Adit, where there is an exhibition presenting the area’s mining heritage. In 2017, Ochrowa Adit was opened with its perfectly preserved passages and shafts dating back more than 300 years. The mine offers an extensive complex for tourism, boasting attractions such as train rides, gold panning, coin minting and gold bar casting. In addition, there is the Museum of Mining and History of Złoty Stok on the mine site. It is also possible to visit a medieval mining settlement

<sup>54</sup> *Muzeum Historyczno-Archeologiczne w Ostroncu Świętokrzyskim*, accessed February 21st, 2023, <https://muzeumostro-wiec.pl/krzemionki/>

<sup>55</sup> ZAGOŹDŻON, Paweł, P., ZAGOŹDŻON, Katarzyna. Udośćępnione pogórnice obiekty...

<sup>56</sup> MIKOŚ, Tadeusz, CHMURA, Janusz. Rewitalizacja i zagospodarowanie turystyczne podziemnych wyrobisk górnicych zabytkowej Kopalni Złota i Arsenu w Złotym Stoku. In: *Górnictwo i Geoinżynieria*, 32 (4), 2008, pp. 41–53.

<sup>57</sup> ZAGOŹDŻON, Paweł, P., ZAGOŹDŻON, Katarzyna. Podziemna trasa turystyczna w „Kopalni złota w Złotym Stoku” – propozycja. In: ZAGOŹDŻON, Paweł, P., MADZIARZ, Maciej (eds) *Dzieje górnictwa – element europejskiego dziedzictwa kultury*, Wrocław: Oficyna Wydawnicza Politechniki Wrocławskiej, 2010, pp. 519-538.



(Figure 4).<sup>58</sup> The mine is visited annually by 120,000 tourists.<sup>59</sup> In 2022, the owner of the mine was awarded Europe's most prestigious heritage award, the European Heritage Awards,<sup>60</sup> for her special contribution to heritage conservation and the mine's sustainable business model.



**Fig. 4:** *The mill in the reconstructed mining settlement in Złoty Stok* (Photograph: B. Baran-Zglobicka)

### Guido mine in Zabrze

Located in the Silesian Voivodeship, Zabrze is one of the best examples in Poland of the co-existence of a city and underground coal mining. In the southern part of the city, there is the historic Guido mine, whose history dates back to the mid-nineteenth century (Figure 2). Operations at the site lasted from the late nineteenth century until 1904. In 1982, the Guido Open-Air Museum was established. Level 170 was opened to the public and in 2007 the Guido historical mine was established. The present tourist route makes it possible to visit the site from the period of the mining activity. At the level of 170 m, there are also historical mining pits (made between 1860 and 1870), especially the large chambers, restored and secured for museum purposes in the 1980s.<sup>61</sup> The mine is located on the Industrial Monuments Route of the Silesian Voivodeship. It was honoured with an award in the competition for the “Best Public Space in the Silesian Voivodeship”.<sup>62</sup>

<sup>58</sup> *Kopalnia Złota w Złotym Stoku*, accessed February 13th, 2023, <https://kopalniazlota.pl>

<sup>59</sup> MIKOŚ, Tadeusz, CHMURA, Janusz. *Rewitalizacja i zagospodarowanie...*

<sup>60</sup> *European Heritage. Europa Nostra Awards*, accessed February 13th, 2023, <https://www.europeanheritageawards.eu/winners/elzbieta-szumaska/>

<sup>61</sup> CHMURA, Janusz, WÓJCIK Andrzej, J. *Problemy ochrony i udostępnianie podziemnych geostanowisk w kopalniach Górnośląskiego Zagłębia Węglowego*. In: *Górnictwo i Geoinżynieria*, 29, (3/1), 2005, pp 135–144.

<sup>62</sup> *Kopalnia Guido*, accessed February 14th, 2023, <https://kopalniaguido.pl/>

### Uranium mine in Kletno

This mine is located in the Lower Silesian Voivodship in the town of Kletno (Figure 2). Activity in the uranium mine began in 1948, when strong radioactivity was recorded within the former St Paul's adit and heaps, associated with former iron, silver and copper mining. During the five years of the plant's operation, 20 adits and three shafts were constructed. The final depletion of the deposit brought the long-term mining activities on this site to an end.

Numerous adits remain from the decommissioned mine. In 2001, the perfectly preserved gallery No. 18 was opened to the public for tourism. Visitors can learn about the history and geology of the site; admire occurrences of minerals such as fluorite, amethyst and malachite; view numerous exhibitions;<sup>63</sup> and take part in a field game, "Minerals as treasure of Kletno". The theme is the cultural, natural and landscape heritage of the Śnieżnik Massif.<sup>64</sup>

### Podgórze mine in Kowary



**Fig. 5:** Interior of Kowary mine (Photograph: B. Baran-Zgłobicka)

mine workings. In the well-preserved galleries and rock cavities, remnants of equipment and infrastructure used in uranium mining (train cars, steel tunnel casings) are on display (Figure 5).<sup>66</sup>

Podgórze mine is located in the Lower Silesian Voivodship, in the Śnieżnik Massif. After a strong radon anomaly was detected in the vicinity of Kowary in 1950, uranium ore mining began. The ore was mined to a depth of about 660 m, and about 41 km of pits were created in eight years. In 2014, the Podgórze Mine underground tourist route was established.<sup>65</sup> Those on the tour use old mining lamps to illuminate the

### Kłodawa salt mine

This mine is located in the province of Wielkopolska, in the town of Kłodawa (Figure 2). Salt extraction and construction of the mine began in 1949–1950. After the salt's extraction, empty chambers of regular shape separated by pillars and shelves remain. The route made available to tourists is the largest and deepest of its kind in Poland, and the tour takes place

<sup>63</sup> CIEŻKOWSKI, Wojciech., GUSTAW, Andrzej. Górnictwo podziemne Masywu Śnieżnika – stara kopalnia uranu w Kletnie. In: *Materiały 41. Sympozjum Speleologicznego*, Kletno, 2007, pp. 25–26.

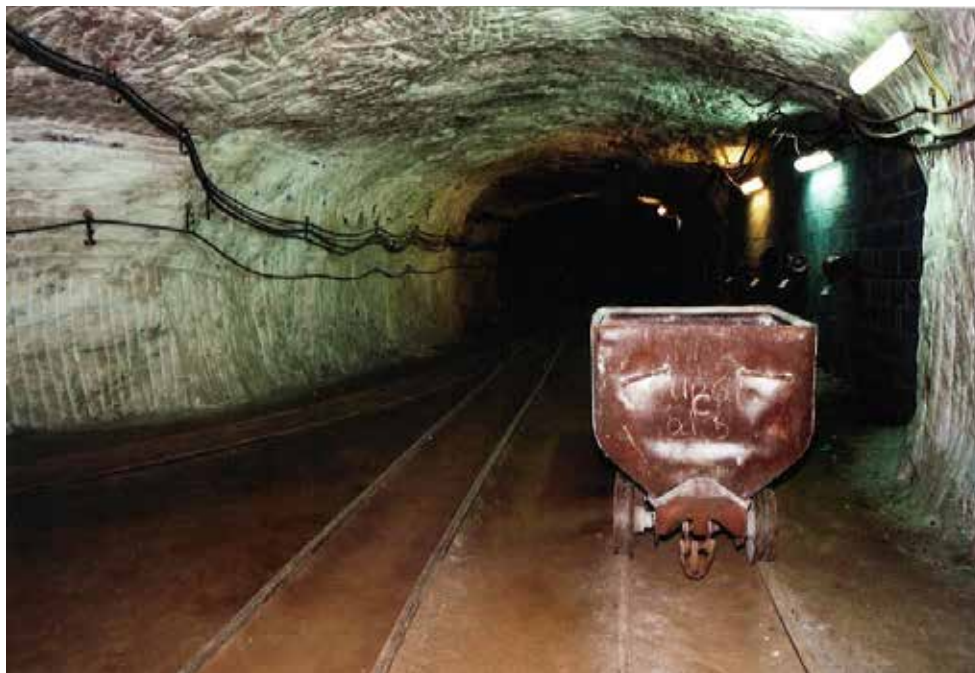
<sup>64</sup> *Kopalnia Uranu. Podziemna Trasa Turystyczna*, accessed February 14th, 2023, <https://www.kletno.pl/>

<sup>65</sup> BORZEŃCKI, Robert, WÓJCIK, Dariusz, KALISZ, Maciej. Pozostałości górnictwa rud uranu i żelaza w rejonie Kowar. Część II. In: *Hereditas Minariorum*, 5, 2018, pp. 51–84.

<sup>66</sup> *Kopalnia Podgórze. Podziemna Trasa Turystyczna*, accessed February 14th, 2023, <http://www.kopalniapodgorze.pl/>



in a mining facility that continues to operate.<sup>67</sup> It is possible to observe mining machinery and infrastructure, and different types of excavations, including abandoned mining chambers, mining transport and ventilation galleries (Figure 6).<sup>68</sup> In 2007 the Klodawa Tourist Route was added to the Register of Historic Places. In 2009 the mine was awarded the Certificate of the Polish Tourist Organisation for the Best Tourist Product.<sup>69</sup>



**Fig. 6:** Salt mine in Klodawa (Photograph: B. Baran-Zglobicka)

## Results

In the assessment carried out, the highest total score was awarded to the gold mine in Złoty Stok (77% of the maximum score). Guido mine (73%) and Krzemionki Opatowskie (69%) also received high marks. The lowest rated were Podgórze mine in Kowary (50%) and chalk tunnels in Chelm (58%). The highest score for scientific and educational value was awarded to Krzemionki Opatowskie (100% of the maximum score) and the lowest score to the Podgórze mine (33%). For functional–tourist value, the Złoty Stok mine received the highest score (85%), while Krzemionki Opatowskie received the lowest (42%). Guido mine was also highly rated (78%) (Table 2).

<sup>67</sup> PODBORSKA-MŁYNARSKA Katarzyna. Assessment of the geological environment in respect of waste disposal in salt mine workings. In: *Geology, Geophysics & Environment*, 39(3), 2013, pp. 223–231, DOI 10.7494/geol.2013.39.3.223.

<sup>68</sup> *Kopalnia Soli Klodawa*, accessed February 14th, 2023, <https://sol-klodawa.com.pl/>

<sup>69</sup> *Polska Organizacja Turystyczna*, accessed March 9th, 2023, <https://www.pot.gov.pl/>

**Tab. 2:** *Results of the assessment of geotourism value*

Tourist route	Scientific and educational value	Functional and tourist value	Total
Chalk tunnels in Chełm	6	9	15
Silver mine in Tarnowskie Góry	7	9	16
Krzemionki Opatowskie	12	6	18
Gold mine in Złoty Stok	8	12	20
Guido mine in Zabrze	8	11	19
Uranium mine in Kletno	7	10	17
Podgórze mine in Kowary	4	9	13
Kłodawa salt mine	7	8	15

In the case of Podgórze mine and Złoty Stok gold mine, the highest and lowest points from individual criteria had a major impact on the final result. The latter route received points in all criteria of functional–tourist value, whereas Podgórze mine did not receive the maximum number of points in any of the criteria for either category. The lack of points for the criterion of legibility of the features and the possibility to hold workshops lowered the final assessment of the site (Table 3). A high score (100%) for scientific and educational value played an important role in the assessment of Krzemionki Opatowskie.

**Tab. 3:** *Average values for each criterion*

	Criteria	Average score
Scientific and educational value	Scientific knowledge / Scientific publications	1.8
	Uniqueness of the facility	1.4
	Diversity	0.9
	Possibility of workshops/ lessons for students	0.8
	Educational products	1.8
	Legibility of features	1
Functional and tourist value	Number of tours	1
	Ticket prices	0.9
	Availability	1.2
	Presence of other tourist attractions	1.9
	Presence of associated infrastructure	1.3
	Routes website and social media	1.9
	Additional attractions in the facility	0.8

The average score for each criterion was calculated. This shows that under the scientific and educational value category, the criteria scientific knowledge (i.e. scientific publications) (1.9 points) and educational products (1.9 points) were rated highest and represent the strong points of sites. The criterion concerning the delivery of workshops or lessons to students was rated lowest (0.8 points). Sites that were exceptions and received the maximum number of points in this criterion were the gold mine in Złoty Stok, Guido mine and the uranium mine

in Kletno (Table 3). For the functional and tourist value category, the lowest scoring criteria concerned additional attractions at the facility (0.8 points). Only two sites scored 2 points in this criterion – the gold mine in Złoty Stok and the uranium mine in Kletno. An average of close to 2 points was awarded to the following criteria: presence of other tourist attractions (1.9 points) and the route's website and social media presence (1.9 points) (Table 3).

The assessment of cultural heritage value indicated that the mine in Tarnowskie Góry, Guido mine and Krzemionki Opatowskie have particularly high heritage value (Table 4).

**Tab. 4:** *Heritage assessment of underground tourist routes*

Tourist site	Uniqueness of heritage	Authenticity of the site	Exhibitions	Material heritage	Accompanying intangible heritage	Total
Chalk tunnels in Chełm	1	1	1	1	1	5
Krzemionki Opatowskie	3	3	2	2	1	11
Gold mine in Złoty Stok	2	2	2	3	1	10
Uranium mine in Kletno	1	2	1	1	1	6
Podgórze mine in Kowary	1	3	2	1	1	9
Silver mine in Tarnowskie Góry	2	3	3	3	3	14
Guido mine in Zabrze	1	2	2	3	3	11
Kłodawa salt mine	2	3	1	1	1	10

Scores: heritage value: 1 – low, 2 – medium, 3 – high

A total of 315 people took part in the survey, of whom 57% were women. The largest group of respondents was young, aged 18–26 years (71%), followed by those aged 27–35 years (13%). The largest group of respondents were people living in cities with more than 500,000 inhabitants (32% of respondents). A similar number of respondents came from cities with 150,000 to 500,000 inhabitants and villages – 23% and 22% respectively. The most common place of residence was Małopolskie Voivodeship (17%), followed by Mazowieckie Voivodeship (15%), Dolnośląskie Voivodeship and Pomorskie Voivodeship (11% each).

The vast majority of respondents had never heard of the mines. In the case of Podgórze mine, 83% of the respondents said they had not heard of it. Awareness was also low for Guido mine (80%), Krzemionki Opatowskie (78%), Kletno uranium mine (78%) and the chalk tunnels in Chełm (76%). The best-known sites were Kłodawa salt mine (64% of respondents) and Złoty Stok mine (64%). Most respondents had never visited the sites. The more well-known (visited) sites were the gold mine in Złoty Stok (37%) and the salt mine in Kłodawa (31%). Krzemionki Opatowskie and the chalk tunnels in Chełm (22%) and Guido mine in Zabrze (17%) saw the fewest visitors (Table 5).

**Tab. 5:** Respondents' responses regarding knowledge and visitation of selected sites

	Have you heard of these facilities?		Have you visited these facilities?	
	responses (%)			
	YES	NO	YES	NO
Chalk tunnels in Chelm	24	76	22	78
Krzemionki Opatowskie	22	78	22	78
Gold mine in Złoty Stok	49	51	37	63
Uranium mine in Kletno	22	78	23	77
Podgórze mine in Kowary	17	83	24	76
Silver mine in Tarnowskie Góry	42	58	24	76
Guido mine in Zabrze	20	80	17	83
Kłodawa salt mine	64	36	31	69

The primary source of information for respondents about the sites was the internet. A number of respondents searched for data in tourist guides and asked friends or family.

Leisure activity was indicated as the main reason for visiting the underground trails (this answer was given by 300 respondents). Respondents also highlighted the opportunity to learn about the geology of the sites (210 respondents) and their cultural value (180 respondents). The dominant motive for arrival was cognitive (interest), particularly evident in the case of Guido mine in Zabrze (59%). Education in the form of school/student trips was the main motive for visiting Kłodawa salt mine (35%) and Krzemionki Opatowskie (32%). Rest/recreation was the main motive for visiting the historic silver mine in Tarnowskie Góry (29%).

Visiting an underground route was the only motive for choosing to visit a region for 15–25% of respondents. This indicator reached the highest value in the case of Guido mine (35%) and the uranium mine in Kowary (29%). This motive was least important in the case of the chalk tunnels in Chelm and Krzemionki Opatowskie (14%). For 40–45% of respondents, visiting an underground route was one of several main motives for coming to a particular region. This was most often the case for Krzemionki Opatowskie (59%), the Kłodawa salt mine (55%) and the Uranium mine in Kowary (54%). Visiting a mine was not important in choosing a region to visit for tourism in the case of the chalk tunnels in Chelm (36% of respondents), Tarnowskie Góry mine (50%) or Podgórze mine (64%).

In terms of tourist attractiveness, the underground tourist routes were rated according to a 4-grade scale: low, moderate, high, very high. Podgórze mine in Kowary and the silver mine in Tarnowskie Góry were rated high by 46% of respondents. In the case of the chalk tunnels in Chelm, 36% of respondents indicated that it has a “moderate” tourist attractiveness and 14% rated it low. The uranium mine in Kletno was given a low rating by 13%. On the other hand, a very high rating was most frequently indicated by respondents for Krzemionki Opatowskie (36%), the Kłodawa salt mine (35%) and the gold mine in Złoty Stok (32%) (Table 6).

**Tab. 6:** *Assessment of tourist attractiveness of facilities in respondents' answers*

	Low	Moderate	High	Very high
	% of responses			
Chalk tunnels in Chelm	14	36	32	18
Krzemionki Opatowskie	9	19	36	36
Gold mine in Złoty Stok	9	16	43	32
Uranium mine in Kletno	13	18	43	26
Podgórze mine in Kowary	13	21	46	20
Silver mine in Tarnowskie Góry	4	25	46	25
Guido mine in Zabrze	12	18	41	29
Kłodawa salt mine	13	13	39	35

According to respondents, the most attractive aspects were the opportunity to learn about the geology and history of the site visited and to learn about mining heritage. Additional attractions at the site, as well as the adaptation of the tour programme to different audiences, are assets of the visited sites (Table 7).

**Tab. 7:** *Top tourist attractions of the surveyed sites among respondents*

Site	Respondents' answers
Chalk tunnels in Chelm	Interesting history of the site, Bieluch Ghost, exhibits
Silver mine in Tarnowskie Góry	Interesting history of the site, boat passage
Krzemionki Opatowskie	Uniqueness, a unique striped flint mine
Gold mine in Złoty Stok	Rafting, many sightseeing possibilities adapted to different age groups, multimedia attractions, high level of work of guides
Guido mine in Zabrze	Going underground, the history of coal mining, the high standard of the guides' work
Uranium mine in Kletno	History of uranium mining in the Sudety Mountains, geological structure, Museum of Minerals in Kletno
Podgórze mine in Kowary	Interesting history of the site, high level of work of the guides
Kłodawa salt mine	Underground slide, underground excavations, geological structure, Poland's deepest underground tourist route

Respondents cited the following as the greatest weaknesses of the sites surveyed: high ticket prices, long travel distances, the need to book visits in advance, and poor tour development, for example, outdated exhibitions. An important element when visiting underground tourist routes is the work of the guide. The vast majority of respondents indicated that the level of information provided by the guide during the tour of the sites was high (180 people); 120 respondents said it was moderate. Among the elements that needed to be changed, respondents indicated that ticket prices should be lowered, tourist routes should be lengthened, and lighting should be improved. Among the factors influencing the attractiveness of the underground routes, respondents indicated the professional preparation of the guide (240 people), the interactivity of the tour (191 people), the ticket price (176 people) and the presence of supporting infrastructure, for example, car parks, accommodation within the site (125 people) were important.

## Discussion

The development of cultural tourism is determined by the rank and importance of tourist attractions. The flagship attractions – that is, the most important and unique ones – can become a tool for economic development and a factor accelerating revitalisation. Kruczek<sup>70</sup> identified the following Polish sites as flagship attractions with the greatest potential to attract tourist traffic: the gold mine in Złoty Stok, Wieliczka mine, Guido mine and Królowa Luiza Open-Air Museum, and the silver mine in Tarnowskie Góry. At the same time, it should be remembered that the potential to use heritage in tourism is proportional to its value, which is determined mainly by its legibility, authenticity, tourist accessibility and visual attractiveness.<sup>71</sup> Mining heritage attractions are viable tourism enterprises, integrating industrial heritage tourism into regeneration policies.<sup>72</sup> Tour operators need recognised and highly valued tourist attractions. Official lists created by international organisations (e.g., UNESCO's list), national bodies (e.g. Poland's List of Historical Monuments) or media-created lists of attractions and interesting places are used in the creation of tourism offers (Figure 7).



**Fig.7:** Entrance to the buildings of the flint mine in Krzemionki Opatowskie (Photograph: W. Zglobicki)

The results of the assessment indicated a high diversity in terms of the scientific and educational value of the mines, including those related to post-mining heritage. Similar results were found when it came to functional and tourist value. It was a positive finding that high scientific–education value generally accompanied high tourist–functional value. The exception was Krzemionki Opatowskie mine, which is of outstanding scientific and educational value but relatively low functional–touristic value. In the former category, scientific knowledge and the availability of educational products were highly rated, while criteria such as diversity and the possibility of workshops/classes for students received the lowest marks. The highest-rated tourism–functional factors were its website and social media presence and the proximity of other tourist attractions. Its weak points were high ticket prices and a lack of additional attractions at the sites.

<sup>70</sup> KRUCZEK, Zygmunt. *Frekwencja w atrakcjach turystycznych w latach 2011-2015*. Kraków-Warszawa: Polska Organizacja Turystyczna, 2016.

<sup>71</sup> PURCHLA, Jacek. *Heritage and cultural mega-events...*

<sup>72</sup> COLE, Denise. *Exploring the sustainability...*

The surveys revealed a lack of knowledge about a large proportion of the post-mining sites, including Krzemionki Opatowskie (a UNESCO site) (Figure 7). Only 20–25% of respondents had heard of them (depending on the mine). For the least known sites, only around 20% of respondents had actually visited, and for Guido mine this figure was only 17%. Visiting underground tourist routes is primarily a form of leisure activity, but 60% of respondents indicated cultural value as an important reason. Underground routes were rated highly by respondents and can, in their opinion, be good tourist attractions. However, they are not usually the main reason for choosing a tourist destination (only 15–25% of respondents said they were). Among the weaknesses of the facilities, respondents listed high ticket prices, lack of adequate promotion, and poor adaptation of routes to tourist traffic. They also emphasised the importance of good preparation by guides, who were usually rated highly.

The cultural heritage of the underground tourist routes was felt to be high and varied, as seen from Table 8. In general, originality is characterised by preserved equipment and underground elements, accompanied by reconstructions of the mining method or directly in the vicinity, e.g., exhibitions of mining equipment or reconstructions of settlements. The sites with the highest post-mining heritage value include the silver mine in Tarnowskie Góry, Guido mine and the flint mine in Krzemionki Opatowskie. At the same time, these are the sites rated highest in the geotourism assessment. This creates very good opportunities for making this heritage accessible in the form of active museums. However, between 50 and 80% of respondents had not heard of these sites, and only between 17 and 20% of respondents had visited them.

**Tab. 8:** *Cultural heritage accompanying underground tourist routes*

Tourist site	Post-mining heritage
Chalk tunnels in Chelm	Old Town well shaft, mining corridors with characteristic niches, individual tool displays.
Krzemionki Opatowskie	Preserved original flint mine (pillar and chamber mines), reconstruction of mining methods and equipment. Flint-ware, reconstruction of a Neolithic settlement.
Gold mine in Złoty Stok	Preserved adits (original), underground railway, museum of mining and history, reconstruction of a medieval mining settlement, gold panning workshop.
Silver mine in Tarnowskie Góry	Preserved adits, mine equipment (carriages), mining methods, open-air museum of steam engines.
Guido mine in Zabrze	Coal mine galleries, mining machinery and equipment (the largest park in Europe), active tour (mining costumes, impersonation of miners), preserved abandoned hard coal wall.
Uranium mine in Kletno	Preserved adits.
Podgórze mine in Kowary	Preserved adits, military significance of uranium, railway carriages.
Kłodawa salt mine	Original mine galleries (active mining), mining machinery.

A SWOT analysis showed that the weaknesses of the underground routes outweigh the strengths, but the external conditions for the development of this type of tourism are favourable (Table 9). The most serious problem is the low level of knowledge about the underground routes and the lack of well-prepared tourism products. Underground tourist routes have a very

high cultural value, which, with appropriate marketing support, could be of wider interest to tourists.

**Tab. 9:** *SWOT analysis of underground tourist routes*

Internal conditions	
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>- wide variety of underground tourist routes</li> <li>- high profile of certain sites</li> <li>- authenticity of the sites</li> <li>- good tourist offer in some facilities</li> <li>- proximity to other cultural sites</li> </ul>	<ul style="list-style-type: none"> <li>- poor promotion of mining heritage</li> <li>- low level of awareness of existing assets</li> <li>- lack of well-developed educational products</li> <li>- high ticket prices</li> <li>- peripheral location of some sites</li> <li style="text-align: center;"><b>- lack of a wide range of accompanying services</b></li> <li>- low involvement of the local community and local government in the preparation of new facilities</li> </ul>
External conditions	
Opportunities	Risks
<ul style="list-style-type: none"> <li>- shift away from mass tourism towards cognitive tourism</li> <li>- systematic regulation of rules for the operation and provision of mining facilities</li> <li>- increasing interest in the site through certificates, heritage lists</li> <li>- development and promotion of tourism products and mining heritage trails</li> </ul>	<ul style="list-style-type: none"> <li>- lack of resources to carry out adaptation work (high costs)</li> <li>- legislative issues related to maintenance and safety in post-mining facilities (current Polish geological and mining law)</li> </ul>

Results from other studies indicate that in terms of sites' attractiveness for tourists, important factors include proper preparation of the site, the ability to move around it without major problems, and reliable presentation of information (including history) about the site, together with a properly prepared guide. For respondents, the educational value of an site was of primary importance when deciding where to visit, and people most often obtain knowledge of these destinations' existence from the internet.<sup>73</sup> Other authors also point out the important educational value of post-mining facilities, both surface and underground.<sup>74</sup> It is important to be able to actively engage visitors (travelling by underground train, working with mining tools) (Figure 8).

<sup>73</sup> JAGIEŁŁO, Anna. Ocena kierunków adaptacji podziemnych obiektów ...

<sup>74</sup> GAJEK, Grzegorz, ZGŁOBICKI, Wojciech, KOŁODYŃSKA-GAWRYSIĄK, Renata. Geoeducational Value of Quarries Located Within the Malopolska Vistula River Gap (E Poland). In: *Geoheritage*, 11, 2019, pp. 1335-1351; JELEN, Jakub. Mining heritage and mining tourism...





**Fig. 8:** Control panel – coal mine in Nowa Ruda (Photograph: W. Zglobicki)

An important issue in efforts to make underground sites available for tourism is the problem of interference with the original excavations.<sup>75</sup> Safety undoubtedly comes first, but care must be taken to ensure that the cultural heritage of the mine is altered as little as possible.<sup>76</sup> For sites that are inaccessible to tourists, primarily for safety reasons, it is possible to use modern technologies – for example, laser scanning and 3D modelling, to present them to the general public.<sup>77</sup> One problem in some former mining sites is the lack of development and accessibility.<sup>78</sup> In Poland there are many such sites, for example, the unique phosphate mine in Annopol. Issues relating to the provision of underground tourist routes were analysed. The authors concluded that there should be legal regulations on the provision and subsequent control of such sites to provide even greater safety for tourists.

Over the last decade, the number of people visiting underground tourist routes has steadily increased, although there was a collapse in numbers in 2020 due to the coronavirus pandemic.

<sup>75</sup> DUŻY, Stanisław, DYDUCH, Grzegorz, PREIDL, Wojciech, STACHA, Grzegorz, CZEMPAS, Artur, UTKO, Sandra. Evaluation of the technical condition of the “Fryderyk” adit in Tarnowskie Góry for the purpose of eventual revitalization. In: *Czasopismo Techniczne*, 6, 2017, pp. 85-99, DOI: 10.4467/2353737XC17.089.6565.

<sup>76</sup> CHMURA, Janusz, WIEJA, Tomasz. Profilaktyka i zapobieganie zagrożeniom w procesie adaptacji i użytkowania podziemnych tras turystycznych. In: *Przegląd Górniczy*, 4, 2015, pp. 83-89.

<sup>77</sup> HRONČEK, Pavel, GREGOROVÁ, Bohuslava, TOMETZOVÁ, Dana, MOLOKÁČ, Mário, HVIzdÁK, Ladislav. Modeling of vanished historic mining landscape features as a part of digital cultural heritage and possibilities of its use in mining tourism (case study: Gelnica town, Slovakia). In: *Resources*, 9 (4), 2020, 43, <https://doi.org/10.3390/resources9040043>

<sup>78</sup> RUIZ-BALLESTEROS, Esteban, RAMÍREZ, Macarena, H. Identity and community—Reflections on the development of mining heritage tourism in Southern Spain. In: *Tourism management*, 28 (3), 2007, pp. 677-687.

In the case of Wieliczka mine, the number of tourists doubled from 1,600,000 in 2011 to 2,078,000 in 2019). Of the routes surveyed, the gold mine in Złoty Stok (145,000 in 2011, 217,000 in 2016) and Guido mine and Queen Luisa Adit (89,000 in 2011, 228,000 in 2019) were the most popular. Traffic was lower at the silver mine in Tarnowskie Góry (54,000 in 2011) and the Krzemionki Opatowskie Mine (38,000 in 2011, 42,000 in 2019).<sup>79</sup>

## Conclusions

The existing cultural heritage resources (underground mining routes) are an important basis for the development of tourism and education. Exceptionally, these heritage sites are under a form of legal protection but many of them are valuable heritage destinations and attract tourists. Certainly, being covered by various forms of protection and being on prestigious lists strengthens a site's position and confirms its value, which attracts interest from tourists. This provides opportunities to prepare underground tourist routes well, while not only maintaining authenticity but also meeting safety requirements and providing complementary services and necessary infrastructure. The joint promotion of tangible and intangible cultural heritage lends authenticity and also brings educational benefits.

However, the research carried out here indicates that potential tourists have poor awareness of the existence of many such sites (even those on the UNESCO list). If tourists do find themselves visiting the underground routes, they generally rate them highly in terms of tourist attractiveness, but they also point out specific weaknesses. Some of the mining sites provide very diverse services, and this allows for better use of promotional tools. Strengthening post-mining cultural heritage in tourism requires the preparation of an offer of branded tourism products widely promoted via the internet. In our opinion, underground tourist routes are an excellent response to the challenge of the need for the intensive development of museums and exhibitions of an interactive nature.

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<sup>79</sup> KRUCZEK, Zygmunt. Frekwencja w atrakcjach turystycznych w latach 2016-2018. Kraków-Warszawa: Polska Organizacja Turystyczna, 2019; KRUCZEK, Zygmunt, NOWAK, Karolina. Frekwencja w atrakcjach turystycznych w 2021 roku. Kraków-Warszawa: Polska Organizacja Turystyczna, 2022.

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