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# Possibilities and limits of development of technical museums in Ostrava region in the nineteenth–twenty-first centuries<sup>1</sup>

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*Possibilities and limits of development of technical museums in Ostrava region in the nineteenth–twenty-first centuries*

The paper analyses the ways in which the idea of the technical museum developed in the industrial region of Ostrava in the course of the nineteenth and twentieth centuries. The issue is determined by political, economic and cultural changes in the following time periods: from the end of Austro-Hungarian monarchy (until 1918); the first Czechoslovak Republic (1918–1938); WWII (1938–1945); post-war development, the so called Third Republic (1945–1948); the communist era (1948–1989); and from 1989 to the present. The development was always determined by whether the idea of the regional technical museum was interesting to powerful and intellectual elites, and what the response was from broader society – hence the significance of newspaper articles and other period reflections of the situation.

Keywords: technical museum, heavy industry, Ostrava region, cultural identity

The term *Ostrava region* covers the region of historically Czech lands on the borders of Moravia and Silesia defined by the upper river Oder and its tributaries the Ostravice and Olše (Olza), which overlaps with *Ostravsko-karvinský revír* (Ostrava-Karviná coal district), an economic unit which is part of the Upper-Silesian coalfield within the borders of the Czech Republic. The discovery of coal in the region in the middle of the eighteenth century and its economic exploitation influenced the course of the industrial revolution, whose consequences were dramatic changes to the mostly agricultural character of local economic production and the formation of an industrial district centred around heavy industry (mining, metallurgy), machinery, chemical industry, energy industry and industry of construction materials. The development of a vast spectrum of industrial activities demanded the region to be connected to the railway system, namely to the Vienna–Halič (Galicia, or Ruthenia in Ukraine) rail route, designed from 1829 by Franz Xaver Reipl (1790–1857), with important communication nodes

<sup>1</sup> The study was carried out within the PUTM project: The contribution of applied arts and technical museums to the economic development and educational culture of Moravia and Czech Silesia: foundations – situation – perspectives, which was funded by the Ministry of Culture, Czech Republic, via the NAKI III programme for the Support of Applied Research and Experimental Development of National and Cultural Identity, project no. DH23P03OVV041, performed in collaboration with Masaryk University, the Technical Museum in Brno and Brno University of Technology.

in Svinov on the Silesian side of the land border and Přívoz on the Moravian side (Ostrava-Přívoz today). The south–north railway complemented the imperial road (Reichsstraße) running Opava–Svinov–Moravská Ostrava–Slezská Ostrava–Těšín, which was built from east to west during 1775–1804. The industrialisation of the region stimulated an abrupt growth of populations in the existing settlements of rural type, which during the second half of the nineteenth century to WWI turned into densely populated industrial towns (Mariánské Hory, Přívoz, Vítkovice, Hrušov, Karviná, Trinec).

It might be presumed that the idea of a technical museum would surely be successful in such a region, because technology has been the source of wealth for the local people. But, for the following reason, this has not been the case: historians, sociologists and geographers often claim that the Ostrava region was a place to which people came to find work in the nineteenth and twentieth centuries, but this is not true. People did not come to Ostrava to work; they came, and even now come, to earn money. The biggest earnings were, and still are, provided by ironworks, mines, chemical factories and power plants, that is, the biggest economic players in the field of heavy industry, machinery and transportation. The consequence of the work opportunities was an extraordinary growth in the number of inhabitants in Ostrava: in 1869 Ostrava (as a cluster of municipalities) had 39,000 inhabitants and by 1940 the number had grown by 200,000, while in the 1890s alone the population grew by 71%.<sup>2</sup> The situation can be simply described as follows: an enormous number of workers, but also businessman and shopkeepers/traders came to earn their living, and until 1945, i.e., up to the nationalisation of the largest factories and banks, that same influx was seen among the owners of the largest factories, ironworks and mines, the representatives of Austrian business circles. They invested in the museums in Vienna and more generally in the Austrian lands, but not in the Ostrava region. An example is the Museum Carnuntinum in Bad Deutsch-Altenburg, focussed on the archaeological finds from the period of the Roman Empire and opened in 1904. The vestibule of the museum building even today features a commemorative plaque with the names of personalities who funded the construction of the museum, including those profiting from the industry in Ostrava (Max von Guttmann, Heinrich Müller von Aichholz, Count Hans Wilczek). The case of Count Hans Wilczek is especially important as the counts of Wilczek belonged to the traditional land-owning aristocracy of the the Ostrava region, namely Austrian Silesia, where they owned extensive lands, homesteads and, especially, the mines. Wilczeks lived in Vienna and Count Hans Wilczek built a private museum of art and applied arts in Kreuzenstein Castle near Vienna, but not in any of his castles in the Ostrava region (Poruba, Dobroslavice). Simultaneously he financially supported Viennese museums and galleries. Regarding the Ostrava region, we cannot say that the owners of the largest factories were uncaring, but the finances were more often invested in the construction of hospitals, schools and social institutes than in culture. Such investments were not acts of pure altruism, but attempts to decrease the permanent social tension. Museums and cultural institutions in general (whether artistic or scientific culture) were not supported as there was a lack of consumers of cultural goods. Workers were not interested in science nor arts; they were largely happy with various free-time activities, mostly sports, although even the labourers organised amateur theatres and choir singing.

<sup>2</sup> ŠOTKOVSKÝ, Ivan. Změny populační velikosti a proces stárnutí města Ostravy [Changes of the population size and ageing process in Ostrava]. In: *Geografie pro život ve 21. století: Sborník příspěvků z XXII. sjezdu České geografické společnosti pořádaného Ostravskou univerzitou v Ostravě 31. srpna - 3. září 2010*. Ostrava: Ostravská univerzita v Ostravě, 2010, pp. 667–668.

Between the industrialists and the large group of labourers, there was a small local intelligentsia – engineers, lawyers, doctors and secondary school teachers – who had come into contact with a cultural life, and its various forms, during their studies in Vienna, Prague or Brno and who probably wanted to create a similar public space in which to share cultural goods directly in their localities. Science, namely the technical and natural sciences, were the source of living, but also the subject of deep personal interest; reading scientific books and journals, following current trends and making efforts to gain personal experience via travelling abroad to learn about technical innovations were natural for them. These personal intellectual interests were connected to the idea of public education which they wanted to develop in the Ostrava region in schools (grammar schools and technical schools) and club activities.

For this reason, the Ostrava region watched closely the foundation of the Technical Museum for Industry and Trades in Vienna (Technisches Museum für Industrie und Gewerbe). It was founded in 1908 on the 60th anniversary of the reign of Austrian-Hungarian Emperor Franz Joseph I and organised according to the famous Conservatoire des arts et métiers in Paris, created in 1794 to support French national industry. In March 1912 there was a general meeting of the Austrian association of architects and engineers, and the local group of Moravian Ostrava and Vítkovice, the Ostrava technicians, invited the senior councillor for construction, Ludwig Erhard (1863–1940), a specialist and from 1913 the director of the Vienna Technical Museum, to present the structure of the institution in preparation. “None of the Austrian regions is so important for industrial development as the Ostrava region”, it was written in the period press, “where the development of ironworks, chemical industry and many related industries, distinguishes such exemplary development”.<sup>3</sup> From this we can infer that Ostrava industry was understood as an integral part of Austrian industry not only in terms of the economy, which is understandable, but also in terms of the perception of local protagonists, in terms of the self-reflection of cultural identity. A year earlier, in June 1911, an Ostrava newspaper had published an article on the Vienna Museum and pointed out that it was a living institution reacting to scientific development and the economic use of technical innovations.<sup>4</sup> The museum was supposed to have two functions: to symbolically express the interest of the state in technical advancement and simultaneously to function as an educational institution informing its visitors about new trends in technology and industry.

Intellectual elites of Czech society in the Ostrava region did not have to share the Austrian patriotism bound to the development of technical museums, but they were definitely interested in the museum activities in Austrian and German lands. For example, in the Ostrava magazine *Horník* (Miner), published by the Union of Mining Supervisors, we can read in the issue from November 4, 1909 a report on the situation in German lands, where the institutions providing technical education (schools, science institutions, museums) covered both science based on primary research and the practice that followed the application of findings in industry.<sup>5</sup> This text was written six years after the foundation of the Technical Museum in Munich, which belatedly reacted to the model in Paris, but founders energetically developed the idea, and thus on November 13, 1906 the collections were made accessible to the public in provisional spaces and simultaneously there was a ceremony where the foundation stone of a new museum building was laid. The practical aspect of art and craft, trade, technology and technical museums

<sup>3</sup> Vortrag im Ingenieur- und Architekten-Verein. Oberbaurat L. Erhard über das Wiener technische Museum. In: *Ostrauer Zeitung*, March 5, 1912, p. 4.

<sup>4</sup> Technisches Museum für Industrie und Gewerbe. In: *Ostrauer Zeitung*, Juni 27, 1911, p. 5.

<sup>5</sup> Deutsches Museum v Mnichově. In: *Horník* November 4, 1909, pp. 182–183.



was continuously emphasised by Czech journalism before WWI, and in Moravia it was added that the region suffered from the lack similar institutions: “The situation in Moravia is not better [than in Bohemia]; moreover we can say it is considerably worse. Moravia lacks even the museums that are available in the kingdom [of Bohemia]. Individual technical schools have failed or reduced their interests to the closest vicinity.”<sup>6</sup> This was also true for the Technical Museum of the Czech Kingdom that was founded on July 5, 1908, and whose activities were watched closely in Silesia and in the Ostrava region, as was declared in the programme of the excursion of the members of the Central Economic Society in Opava, realised in May 1913. The excursion included a visit to the jubilee exhibition of the chamber of commerce in the Prague Castle premises, as well as to the Technical Museum of the Czech Kingdom, both of which exhibited their collections in the Schwarzenberg Palace in Hradčany at that time.<sup>7</sup>

The Technical Museum of the Czech Kingdom was initiated by professors at the Czech Technical University in Prague and representatives of Czech industry, and the relation of the educational institution to the creation of collections or to individual museums can be traced throughout the entire existing tradition of technical museums in Czech lands. The beginnings of technical museums in Czech lands should include the study collection of the Estate Academy in Olomouc (founded 1724, restored 1791), which included the “economic museum”, a collection of education aids suitable for the teaching of construction, land surveying and other practical disciplines. An educational aspect was also present in the collection of the Society for the Support of Industry in Bohemia (Verein zur ermunterung des gewerbsgeistes in Böhmen) based in Prague, founded in 1833; the collection consisted of samples, models, machines and instruments, inventions and various technical aids. As a private project, Vojta Náprstek, inspired by the South Kensington Museum in London (founded 1852), established the Czech Industrial Museum in Prague and followed educational objectives.<sup>8</sup> The establishment of similar institutions in the Ostrava region at the turn of the nineteenth to twentieth centuries was unimaginable; nevertheless, the professor at the Czech Grammar School in Moravian Ostrava, Antonín Mejstřík (1877–1932), tried to implement the idea of an industrial museum. He formulated the idea in his lecture “On the Industrial Museum”,<sup>9</sup> held circa half a year after the establishment of an association that was created to realise this idea directly in Ostrava. The museum was opened on June 2, 1907 in a new building of the Czech real school, and in terms of the collection structure, it was at its nucleus a trade and technological museum focussed on various products and materials, including raw materials, and their processing. An important part was the library, opened to the public. However, the existence of this promising and developing institution was short, as WWI and the reorganisation of museum institutions in Ostrava that occurred after the war ended the operation of this independent Czech Industrial Museum.

The Czech Industrial Museum in Moravian Ostrava suffered from a serious deficiency: it was not directly connected to industry, to specific companies, factories, firms or workshops that would provide financial support or donate objects that had lost their purpose or sample products decently representing the companies. It was rather a study collection, a school cabinet

<sup>6</sup> MELICHAR, A. Lidová akademie pro umělecký průmysl. [Folk academy for art industry.] In: *Moravskoslezská revue*. Ostrava, 1908–1909, pp. 40–41.

<sup>7</sup> Program společné výpravy do Prahy. [The programme of the group excursion to Prague.] In: *Noviny těšínské*, Mai 5, 1913, p. 5.

<sup>8</sup> GRUBER, Josef. *Technické museum pro Království české*. [Technical Museum for the Czech Kingdom.] Praha: Přípravný komitét, 1908, pp. 4–5.

<sup>9</sup> Přednáška/Lecture. In: *Ostravský kraj*, February 16, 1907, p. 3.

of aids, focussing on models. Modern technical museums, which the inhabitants of Ostrava could see in Munich, Vienna or Prague before WWI and in the interwar period, had a different motivation, as summarised by Josef Gruber (1865–1925), a Czech lawyer, pedagogue and organiser of Czech economic life, on the occasion of the constitution of Prague museum:

It is an interesting as well as ethical phenomenon, that in the new era even technology specialists strive for a history and systematisation of technical sciences, for a cultivation of the history of industry, work and production. Older periods knew the collections of production aids, tools, instruments and machines, raw materials and auxiliary materials only as a means to elevate the industrial work, and only natural development made these collections historical ones. Even the most modern collection of technical aids will become a historic collection in the course of time.

And then, much as it may lose its interest for teaching, it may nonetheless be exceptionally interesting in other museological regards. Thus, numerous collections from technical schools and scientific institutions (namely those aforementioned, the Society for the Support of Industry in Bohemia, in Prague, and the Estate Academy in Olomouc) gradually lost their original attractiveness as objects were damaged or destroyed by frequent use. “The new era” Gruber continued, “having learned about the great educational as well as ethical meaning of the history of technology, fosters directly and continuously the collection of heritage and the foundation of historical-technical museums”.<sup>10</sup> Gruber paraphrased the words of Wilhelm Exner (1840–1931), the initiator of the technical museum in Vienna, who emphasised that instruments and machines that have lost their practical function (as well as school aids that had lost their function) because they have been surpassed by new, modern, advanced technologies, provoke interest in technical progress in the viewers, and their collections generate the interest of society in new technologies and inventions.

The term *technology* has a broad meaning; it includes heavy industry (mining, metallurgy) and a wide area of machinery, and since the end of the nineteenth century has also covered electrical engineering and chemistry, and further, sound and visual media (photography, film), methods of measuring time, water-management, meteorology, geodesy and cartography and last but not least the road and train transportation that was developing massively at the turn of the nineteenth to the twentieth centuries. Technical museums include objects and artefacts documenting the reproduction of script and conservation of texts (printing), construction technology and the food industry (sugar factories, distilleries, breweries). Technical museums may also document the construction of musical instruments, including some of particular technical and financial demands (organ making, bell foundry). Due to the organisation and financial demands, and large space requirements, only the central museum institutions are able to follow such a broad spectrum; thus, in the Ostrava region, without proper financial and space provisions, it was possible to document only a fragment, specifically the mining of black coal. Thus, a study collection on black coal was established by the District Mining Office in Moravian Ostrava with the title Museum für Unfallverhütung im Bergbau beim k. k. Revierbergamte in Mährisch Ostrau (Museum of mine rescue of the District Mining Office). Generally, the museum was known under the shorter, though imprecise title Mining Museum, imprecise because it did not document the methods of mining, the process of surveying and excavation works (mine surveying, underground construction), coal transportation and sorting, processing or technical use (coke production, gas production, i.e., the production of coal gas

<sup>10</sup> GRUBER, *Technické museum...*, p. 6.

and its distribution). Also, the museum did not cover the social issues connected with mining (construction of miner colonies, health insurance), nor the special technical education. Without doubt, the reason was the fact that the museum was not a product of the chamber of commerce (the Ostrava region was part of the Opava and Olomouc chambers of commerce), nor of any technical university, none existing in the region; the museum was an initiative of the engineers of the mining office and the pedagogues of the mining school.<sup>11</sup> The collection of the District Mining Office was opened to professional public in 1905. By 1911 the museum had available four spaces in the building of the office, where one could see models of the mine works. The initiator of the collection was Ferdinand Zach (1866–?), who came to Ostrava in 1896 as a mining commissioner, in 1898 became senior mining commissioner and in 1908 left for Teplice v Čechách and became a director of the local mines. The collection was further enlarged and in 1911 a catalogue with 558 entries was printed. Two years later the collection was introduced at the international congress on work safety and rescue in Vienna.<sup>12</sup> Further development of the collection was interrupted by WWI.

The foundation of Czechoslovakia (October 28, 1918) opened a new, state perspective for technical museums, though numerous complications prevented the realisation of the idea to establish a museum in each region. Czechoslovakia consisted of four regions: Bohemia, Moravia-Czech Silesia, Slovakia and Sub-Carpathian Rus. While the technical museum already existed in Bohemia, in Slovakia one was established only after WWII (in 1948 in Košice), the purely agrarian character of Sub-Carpathian Rus excluded such establishment there, but the industrially developed region of Moravia-Silesia was an ideal place for the establishment of a technical museum. Already in 1834, the Economic Society in Brno was striving for the establishment of a museum connected to the technical lyceum.<sup>13</sup> An impulse for the development of technical museums in Brno was a constitution of technical universities, the German technical school being founded in 1849 and in 1873 becoming a university, while in 1899 a Czech technical university being established. A committee for the constitution of a museum was formed relatively late, in December 1924, and Prof. Ing. Karel Ryska (1868–1939),<sup>14</sup> the chairman of the Brno office of the Association of Czechoslovak Engineers, and a member of the Czech Technical University, was an active member. It was this organisation that formed the basis for the preparation of Brno technical museum. Ryska, as a member of the scientific board of Masaryk Academy of Work, was well aware of the educational goals of this influential organisation, with a statewide scope and knowledge of trends in technical museums. Eventually, the members of Brno preparatory committee refrained from their goals in favour of the curatorium of the Technical Museum in Prague, which asked them to postpone their intention to establish a technical museum until a modern building for the Prague museum had been built.<sup>15</sup> The Prague museum was finally completed during 1938–1941, and thus an

<sup>11</sup> Založena byla v roce 1871, výuka započala ve školním roce 1874/1875. DOHNAL, Miloň. Založení horní školy v Moravské Ostravě v roce 1871. [Foundation of the mining school in Moravian Ostrava in 1871.] In: *Ostrava. Sborník příspěvků k dějinám a výstavbě města* 6. Ostrava: Profil, 1973, pp. 241–252.

<sup>12</sup> *Bericht über den II. Internationalen Kongreß für Rettungswesen und Unfallverhütung*. Wien: Verlag der Kongressleitung, 1914, p. V.

<sup>13</sup> *Die k. k. technische Hochschule in Brünn. Geschichtlich-statistische Skizze herausgegeben aus Anlass 25 jährigen Bestandes der Lehr-Anstalt*. Brünn: Rudolf M. Rohrer, 1875, p. 8.

<sup>14</sup> KONEČNÁ, Eva. Z historie Technického muzea v Brně. [From the history of the Technical Museum in Brno.] In: *Sborník Technického muzea v Brně – Acta technici Brunensis*. Brno: Technické muzeum, 1975, p. 7.

<sup>15</sup> Bude na Moravě technické muzeum? [Will there be a technical museum in Moravia?] In: *Lidové noviny*, February 2, 1938, p. 8.

independent technical museum for Moravia and Silesia was not established in the interwar period.

The interwar period saw a constitution of a new type of memory institution – the archive for the history of industry. It was a specialised institution collecting documents produced by the activity of economic corporations, associations, trade chambers and other organisations tied with industry, commerce and the development of technology in a particular region. The Prague historians in Bohemia had striven for the establishment already at the beginning of the twentieth century, but their effort was completed only in 1931. In Moravia such an archive was constituted in Brno in 1936, and it gathered documents regarding Brno and its surroundings. Its operation was discontinued by WWII and was resumed in 1947 as a branch office of the Prague archive.<sup>16</sup> In Ostrava the Archive for the History of Mining and Industry of the Ostrava Region was constituted only at the turn of 1930s to the 1940s; the date of foundation is established as December 1, 1940. It is not clear, though, who came up with the idea of a specialised archive for the Ostrava region, whether from Bohemia or – more likely – from Germany.

Thus, we get to the history of the district coal mining office museum that we abandoned during the years of WWI. After the war, it operated with the erroneous title Museum of Mining, and when the House of Art was completed (1926), the former was moved into its basement. There are very few reports on its operation; it was a low-profile institution representing the Ostrava industry on various occasions – for example, in 1926 the congress of educational workers of Moravia and Silesia visited the museum and an erudite commentary was provided.<sup>17</sup> During the interwar period the idea of a technical museum was not implemented in the Ostrava region, even though the mining organisation was very active in the region and supported professional organisations (professional associations and supporting associations) and the construction of schools and health and social centres;<sup>18</sup> but the idea of a museum was not developed. Moreover, state interest was lacking, because the state (sic!) mining museum had not been established in Ostrava, but in Slovakia in 1927, as the State Mining Museum of Dionýz Štúr in Banská Bystrica. The interest in technical museums in the Ostrava region increased at the turn of 1930s to 1940s, thus paradoxically during the German occupation. The product of this interest was a large exhibition on the history of industry in the Ostrava region organised in the House of Art in 1940, and the transfer of the newly organised Mining and Industry Museum (Bergbau- und Industrie Museum) together with the Archiv für Bergbau und Industriegeschichte im Ostrauer Kreis to the building of a closed school in Ostrava Vítkovice in 1942. Also paradoxically, after 1945 the interest in technical museums decreased and the collections of the Mining and Industry Museum merged with the city museum, the documents from the then Archive for the History of Mining and Industry of the Ostrava Region were moved to the city archive in 1950,

<sup>16</sup> GRÜNFELD, Josef. Archiv pro dějiny průmyslu, obchodu a technické práce v Brně. [Archive for the history of industry, commerce and technical work in Brno.] In: *Vědecká ročenka Moravského uměleckopřemyslového muzea Obchodní a živnostenské komory*. Brno: Moravské uměleckopřemyslové muzeum, 1948, pp. 144–146; SLABOTÍNSKÝ, Radek. Archiv pro dějiny průmyslu, obchodu a technické práce v Brně v letech 1948–1953. Kapitola z počátků brněnského hospodářského archivnictví. [Archive for the history of industry, commerce and technical work in Brno during 1948–1953. Chapter on the beginning of Brno economic archives.] In: *Brno v minulosti a dnes. Příspěvky ke dějinám a výstavbě Brna* 30. Brno: Archiv města Brna, 2017, pp. 383–436.

<sup>17</sup> Sjezd osvětových pracovníků a obecních knihovníků župy moravskoslezské. [Congress of educational workers and public librarians of the Moravian region.] In: *Černá země*, November 11, 1926, p. 76.

<sup>18</sup> Činnost těžářstev dokumentuje šestisvazkový soubor publikací Kamenouhelné doly Ostravsko-karvinského revíru, vydaný v letech 1929–1931. The activities of mining society are documented in the six volumes of *Kamenouhelné doly Ostravsko-karvinského revíru* [Hard coal mines in the Ostrava-Karvina region], published in 1929–1931.

and the publications from the museum library went to various libraries, including the State Study Library (today Research Library) in Ostrava.

Nevertheless, in the period after 1945, one condition for the successful development of technical museums in Ostrava was achieved – the Mining Academy was transferred from Příbram to Ostrava by decree of the president of the republic on September 8, 1945.<sup>19</sup> Already at the beginning of the twentieth century Alois Irmeler (1846–1915) had pleaded for the establishment of an Austrian-wide mining academy in the centre of the territory where mining occurred, i.e. close to the mining and metallurgy works, while the intention was that such school would not be established in Vienna, but in Prague.<sup>20</sup> In the conditions of post-war Czechoslovakia, with the perspective of the restoration and significant development of industrial production in the Ostrava region, Ostrava seemed to be the centre. The act of the school transfer from Příbram to Ostrava was not sufficient, because the education was organised in provisional conditions and the modern school campus was constructed only during the 1960s and 1970s. Therefore, the foundation of a technical museum in the region was not planned. Moreover, in the 1950s the Technical Museum in Brno was founded and took charge of the collections from North Moravia and Silesia. The official year of foundation of this museum institution is 1961, though this institution had older organisational predecessors.

After the communist coup d'état in February 1948, the situation of museums in the Ostrava region was paradoxical: on one hand the importance of the museum institution for the education of citizens of a socialistic state was emphasised, but on the other hand, museums were underfinanced and lacking in personnel, material and, foremost, buildings that would be suitable for museum work, as well as lacking a clear concept and methodical management. In the second half the twentieth century, the prevailing type of museums in the Ostrava region were museums of national history that followed the development of the region via traditional disciplines (archaeology, ethnography, history of art and the natural sciences, namely botany and zoology); technical museums were not developed, although there were certain attempts to balance the deficit. In May 1952, a framework concept for a completely new institution – a regional mining-metallurgy museum in Ostrava, was developed. Nevertheless, this material had no influence on the implementation of the idea of technical museums in the region and was never realised.<sup>21</sup> In 1953, a new concept of a museum network of the Ostrava region was developed, including a requirement to establish a special mining and industrial department in the city museum in Ostrava. In 1954, there was a new proposal to establish a completely new industrial museum for the Ostrava region and to place this institution in a Renaissance castle in Stará Ves nad Ondřejnicí, located approximately 20 kilometres south-east from the centre of Ostrava.<sup>22</sup> We need to emphasise that this proposal was not connected to the above mentioned proposal of 1952; both concepts point to the arbiters of technical museums in the Ostrava region: in the first case it was the Association of Czech Museums in Prague, and in the second

<sup>19</sup> BIOLKOVÁ, Jindra – KAŠING, Petr. Vývoj vysoké školy báňské v podmínkách ostravského regionu v letech 1945–1969 [Development of the Mining University in the Ostrava Region in 1945–1969]. In: *Acta Universitatis Carolinae – historia Universitatis Carolinae Pragensis*, Tomus LII, Fasc. 1. Praha: Univerzita Karlova, 2012, pp. 39–60.

<sup>20</sup> IRMLER, Alois. Scentralizování hornického vyučování. [The centralisation of mining education.] In: *Hornické a hutnické listy*. August 10, 1902, pp. 121–123.

<sup>21</sup> KALUS, Jaromír. Podnikové muzejnictví v Severomoravském kraji. [Company museums in the North Moravian region.] In: *Muzejní a vlastivědná práce*. Praha: Národní muzeum, 1986, pp. 213–214.

<sup>22</sup> PLAČEK, Vilém. K otázce sítě, pracovních náplní a činnosti muzeí v Ostravském a Severomoravském kraji v letech 1949–1963. [On the question of network, work content and activities of museums in Ostrava and the North Moravian Region in 1949–1963.] In: *Časopis Slezského muzea*, série B. Opava: Slezské muzeum, 1980, p. 26–27.

case it was the Regional Museum Council of the Regional National Committee in Ostrava. Although this idea was not directly mentioned, it is obvious from the context that museums of a technical type, whether in the form of one regional institution and mapping more industrial branches, or as a multitude of documentary centres or expositions at the level of individual industrial works, could not start without the participation of managers and technicians working directly in the works. It was the *company museums*, whose emergence culminated in 1970s and 1980s, which became the updated form of technical museums. The trend of founding company museums complied with the state politics to expand existing museum institutions and to stimulate the foundation of new museums that would aim to comprehensively document the present. In the Ostrava region this applied to the company museums of Vagonka in Studénka (1956), the ironworks in Třinec (1969), the ironworks-wireworks in Bohumín (1976) and the rolling mill in Frýdek-Místek (1983). The centre of the industrial area – Ostrava – was preparing for the constitution of a mining museum. Around 1960, there was an idea to use the mine Eduard Urx and its grounds in Ostrava-Petřkovice for museum purposes, which developed during the 1970s and 1980s into theoretical considerations, historical studies and architectural proposals. In the middle of the 1980s, it was supposed that the museum would be opened to the public in 1995.<sup>23</sup> By this date we cross the border represented by November 1989, when Czechoslovakia and other states of the so-called Soviet Bloc saw the fall of communist regimes.

After 1989, the Ostrava region found itself in a completely new, unprecedented situation which, much more than in other regions of Czechoslovakia, was affected by the political events of the turn of the 1980s to 1990s and influenced the life of the local society. It is logical, because together with the implementation of political attributes of a democratic state (adoption of a new democratic constitution and in 1992 complemented with the Charter of Fundamental Rights and Freedoms, and thus opening plurality in the political system and the principle of free elections, de-politicisation of justice, police and army etc.), the post-communist governments enforced economic transformation, including price liberalisation, privatisation and restitution, such that the production means had a particular, private owner. The prevailing trend was the successful development of private entrepreneurship, including a banking sector and insurance companies, and the deregulation of foreign trade and capital flow. These economic processes fatally influenced the future development of the Ostrava region, because when privatising local large state companies, coupon privatisation was opted for with the aim to rapidly transfer the state properties into the hands of private persons, more precisely to joint-stock companies with specific owners. If the large companies in the Ostrava region had determined the lives of practically the whole population, including the operation of memory institutions (company museums and company archives) for decades, in this new political-economic situation characterised by the disassembly of the centrally planned economy, everything that was not directly connected with personal profit was put aside. The museums were not prepared for such societal processes; the existing museums lacked money, but foremostly visions. The radical changes in the inner organisation of the state and in the competences of individual ministries (including a recurrent idea to do away with the Ministry of Culture) had a negative impact on the museums. Specifically, in 1990 the regional national committees were abolished, but ten years later they were – again so to say – reestablished with the regional councils who became the authorities of the originally district, but nowadays regional museums, galleries and

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<sup>23</sup> KALUS, Podnikové muzejnictví..., pp. 216–217.

libraries. The role of the state in the museum sphere was limited to state-funded organisations (in the Ostrava region there is only the Silesian Land Museum).

At the beginning of 1990s, nobody could imagine the future development of museums; it was only believed that museums would retain their social importance. “Now a completely new reality opens in front of us”, wrote Zbyněk Z. Stránský in his reflection on the future situation in the (still) Czechoslovak museums; “our existence depends on whether the new democratic public needs and will need us. In other words: what can we, museum workers and our institutions, give to this new society.”<sup>24</sup> Stránský vaguely indicates future events, because in 1990, when he said the words, the consequences of the fundamental structural changes that were to happen during the 1990s were not clear. From the sociological point of view, these changes can be generally summarised as a transformation from an industrial society to a consumer society. As a consequence of these changes, the goals and possibilities of museums also changed after 150 years. They were formulated with the intentions of an industrial society characterised by the development of industrial production and the pressure to increase the competences of the workers having to cope with more and more complex working methods. Technical museums of the nineteenth century and most of the twentieth century were related to education, with efforts to counterbalance the knowledge deficits among the members of the society, a consequence of unequal opportunities in education. And simultaneously – only symbolically – the museums seemed to the visitors as a *temple of progress* as well as a *temple of work*, because work was highly positively evaluated as activity leading to the production of material goods and to the development of welfare. In a consumer society, museums have a different function: as a form of entertainment, a free-time activity for all age groups; a certain relation of the museum to contemporary science is retained, but it is not so strong as it used to be 50 or 100 years ago. Nevertheless, states are not prepared to entirely relinquish the symbolic function of museums, though this tends to be fulfilled primarily by political and military museums and in museum expositions of modern history, while the symbolic function of technical museums is typically weaker.

After 1989, the development of technical museums in the Ostrava region got a new impulse during the restructuring of industry and the phase-out of mining (coalmining stopped within the city limits in 1994), and the vast industrial districts, mines, ironworks, electricity plants, factory halls, warehouses and administration building became redundant. It was obvious that the most valuable facilities might become museums as *mining skansens*. Similarly to Příbram in central Bohemia, where the Mining Museum opened in the 1990s presenting mining heritage in the locality of Březové Hory, or the Mining Skansen Mayrau in Vinařice near Kladno (opened to the public in 1994), Ostrava also opened three areas that musealise clusters of industrial objects, including the original technology: Michal Coalmine (Ostrava-Michálkovice), Landek Park – Anselm Mine (Ostrava-Petřkovice) and a multifunctional area in Ostrava-Vítkovice with the Hlubina Mine at its core and the blast furnaces. Their cultural use is comprehensive; they include programmes for all age groups, including children, and activities connected with the tradition of the place, but also events to which the industrial scenery forms only a spectacular backdrop (the music festival Colours of Ostrava in Dolní oblast Vítkovice, for example). Another essential function of mining areas is for gastro events. The breadth of cultural use of these three and

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<sup>24</sup> STRÁNSKÝ, Zbyněk Z. Víme, co chceme? Příspěvek na diskusním fóru dne 11. ledna 1990 v Národním muzeu v Praze. [Do we know what we want? A contribution to the discussion forum on January 11, 1990 in the National Museum in Prague.] In: *Muzejní a vlastivědná práce*. Praha: Národní muzeum, 1990, p. 7.

similar industrial complexes has induced a need for university study programmes, particularly the creation of the study programme Geoscience and Mining Tourism realised at the Faculty of Mining and Geology, Technical University of Ostrava, which provides comprehensive knowledge of the natural environment, mining and technical industrial monuments and their presentation to the lay public. Mining tourism has raised great expectations to attract numerous visitors to the Ostrava region and its presence may help to develop the associated services (transportation, accommodation, gastro facilities, wellness). Today, mining tourism already forms 30 percent of tourism in the Moravian-Silesian region, and the number will rise in the following years. And thus, mining tourism will open new opportunities for the development of technical museums in the Ostrava region.<sup>25</sup>

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<sup>25</sup> JAŠKOVÁ, Klára. *Montánní cestovní ruch v Moravskoslezském kraji* Bakalářská diplomová práce. [Mining tourism in the Moravian-Silesian region. Bachelor's thesis.] Hradec Králové. Univerzita Hradec Králové, fakulta informatiky a managementu, 2023.



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# The Enlightenment Museum as a Result of the Development of Education: The Case of the Musaeum Polonicum

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## *The Enlightenment Museum as a Result of the Development of Education: The Case of the Musaeum Polonicum*

The article presents the concept of the Musaeum Polonicum, developed in 1775 and published in the magazine *Zabawy Przyjemne i Pożyteczne*. Its author, Michał Jerzy Wandalin Mniszech (1748–1806), was an intellectual educated in the spirit of the European Enlightenment, involved in the scientific, cultural and political life of the Republic of Poland. He planned the museum as a didactic base for the academy of sciences and arts. The collection was to have a distinct national character, with educational and research functions. It was divided into groups corresponding to the Enlightenment classification of sciences. In the history of Polish museology, the Musaeum Polonicum was the first initiative to establish a national museum, although the project was ultimately not implemented.

The research methodology was based on the classical historical approach of studying source texts, while taking into account the research perspectives of contemporary museological discourse. Archival materials representing two thematic groups were analysed: early museological texts which applied in the cultural area of the Republic of Poland in the second half of the eighteenth century, and texts related to Polish education and schooling. The results of these analyses are set in a European context. The aim of the article is to introduce a new research perspective to historical museology and the history of collecting. Its main assumption concerns the treatment of Enlightenment museums as a result of the development of education.

Keywords: concept of the Musaeum Polonicum, Enlightenment museum, didactic collection, scientific collection, Polish museology, historical museology, theoretical museology

## Introduction

Michał Jerzy Wandalin Mniszech's concept for the Musaeum Polonicum, published in *Zabawy Przyjemne i Pożyteczne* magazine in 1775, is considered the earliest Polish museological text. In this article, Mniszech's idea is presented from the perspective of contemporary museological discourse, based on Zbyněk Z. Stránský's theory.<sup>1</sup> According to this Czech researcher, the museum as an "end", a visible effect, should not be the main subject of research, because it is the relationship between humans and the reality of that time that is crucial.<sup>2</sup> In the case

<sup>1</sup> See, e.g.: STRÁNSKÝ, Zbyněk Z. Museology as a Science (a Thesis). In: *Museologia*, 1980, 15(11), pp. 33–39.

<sup>2</sup> SOARES, Bruno B. Zbyněk Z. Stránský. In: SOARES, Bruno B. (ed.). *A History of Museology. Key authors of museological theory*. Paris: ICOFOM, 2019, p. 80.

of Michal Mniszech, this relationship is reflected in the pedagogical attitude towards the emerging modern nation during the political collapse of the Partition Period, as presented in this article. It manifested in the first Polish museological concept, as set out in the treatise “Myśli względem założenia Musaeum Polonicum” (Thoughts on establishing the Musaeum Polonicum). Stránský’s research approach, known as *metamuseology*, can be extended to include a philosophical perspective.<sup>3</sup> Michel Foucault’s concept of *effective history* is interesting, in that it rejects the perspective of a continuous, linear, developmental history. Thanks to this, the past is effective, that is, discontinuous and dispersed. The subject of research should not be not institutions or theories, but practices. Foucault also distinguished three epistemes, which can be understood as structural networks enabling and mediating knowledge of culture. An episteme is therefore “an unconscious form of thought common to a society in a given era”.<sup>4</sup> The philosopher divided epistemes into Renaissance, classical and modern. Renaissance epistemes in a general sense involve treating the world as a cipher and a puzzle to be solved. A classical episteme, dating from the period of Descartes’ work, uses the categories of measure and order. The most modern of Foucault’s episteme breaks with the previous two; it concerns thinking in terms of analogy and sequence, and the subject of academic study is typically humans.<sup>5</sup> The Musaeum Polonicum would fit under the category of classical episteme, as it concerned the organisation of an available scientific and research space divided into cabinets where knowledge would be presented using systematised museum exhibits. The use of Foucault’s archaeological method opens new interpretative possibilities in the field of historical museology, but requires separate, in-depth research.<sup>6</sup>

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Knowing is seeing, and if it be so, it is madness to persuade ourselves that we do so by another man’s eyes, let him use never so many words to tell us, that what he asserts is very visible. Until we ourselves see it with our own eyes, and perceive it by our own understandings, we are as much in the dark, and as void of knowledge, as before, let us believe any learned author as much as we will.<sup>7</sup>

The words of John Locke, one of the leading representatives of the Enlightenment, illustrate a significant turning point in the development of eighteenth-century European education and culture. This shift involved a transition from the early modern *binc omnia* to the modern *hypotheses non fingo*, that is, from practicing science in a classical, philological style to acquiring knowledge through sensory experience. Thus, the way of acquiring knowledge changed. Modern cognition through experience stood in opposition to Early Modern cognition via the written word. Cicero’s words became the symbol of a humanistic university, under the authority of the church and focused on classical philosophy and theology. Isaac Newton’s words symbolise a

<sup>3</sup> Metamuseology was also developed by Friedrich Waidacher, who classified museology as a humanistic discipline and proposed the use of philosophical tools in explaining the discussed relationship between man and reality. See: BIEDERMANN, Bernadette. The theory of museology. Museology as it is – defined by two pioneers: Zbyněk Z. Stránský and Friedrich Waidacher. In: *Museologica Brunensia*, 2016/05/02, p. 55.

<sup>4</sup> ADAMIAK, Marzena. Foucault i perypetie podmiotu. In: *Przegląd Filozoficzny – Nova Seria*, R. 11: 2002, Nr. 42(2), p. 185.

<sup>5</sup> Ibidem, p. 186.

<sup>6</sup> An interesting case study in the field of classical episteme is the study of the problem of the so-called Repository, i.e., the Royal Society Museum in London. See: HOOPER-GREENHILL, Eilean. *Museums and The Shaping of Knowledge*. London, New York: Routledge, 1992, pp. 133–166.

<sup>7</sup> LOCKE, John. *The Conduct of the Understanding*. London: J. F. Dove, 1825, p. 51.

secular Modern academy mainly focused on the natural sciences and empirical research. The transformation of education also included changes to the activities of collecting. Scientific cabinets, developed from Early Modern cabinets of curiosities, were educational spaces – meeting places for researchers, research laboratories, or a way of popularising knowledge. It was from them that modern public museums were created in the mid-eighteenth century.<sup>8</sup>

## Education and Collecting: Growing Together

The intellectual revolution of the Enlightenment was announced by Francis Bacon when he popularised the methodology of natural sciences and the inductive method, presented in 1620 in the work *Novum Organum*. He presented a modern attitude towards research and a vision of an ideal, independent research institute, “Solomon’s House”, important for historical museology,<sup>9</sup> in the utopian work *New Atlantis*, published posthumously in 1627. Bacon’s thought shaped the attitudes of subsequent generations of philosophers and researchers, which resulted in, among other things, transformation of education at the theoretical level. His ideas are visible in Locke’s writings on teaching, such as “Essay Concerning Human Understanding” (1690) and “Some Thoughts Concerning Education” (1693). Locke proved that the nature of knowledge and its source come from experience.<sup>10</sup> He based this belief on the pedagogy of Johann Amos Comenius, the creator of didactics, and the idea of demonstrative teaching, which relies on the involvement of the senses in the learning process.<sup>11</sup> In the middle of the eighteenth century, Jean-Jacques Rousseau became a continuator of the ideas of both pedagogues. In the naturalistic pedagogical manifesto *Emil, or On Education* (1762), he expressed his conviction regarding the need for man’s “return to nature”, i.e. learning through experience, engaging the senses and constantly stimulating cognitive curiosity.

In the period preceding the so-called Age of Reason, museological texts appeared that corresponded with pedagogical texts. As well as having significantly influenced the development of Enlightenment museology, they allow us to understand what a museum was in the Early Modern and Modern periods. An interesting example is the school reform project of the Scottish theologian, John Dury, from 1650.<sup>12</sup> It concerned, among other things, organising “houses” where lessons and workshops could take place. The largest of these houses’ rooms were to be museums, equipped with scientific instruments and teaching aids such as globes, maps, models, machines, engravings and “everything that is subject to the senses”.<sup>13</sup> Dury’s concept is consistent with Comenius’ pedagogical method, based on the sentence *in intellectu autem nihil est, nisi prius fuerit in sensu*<sup>14</sup> [there is nothing in the mind that has not been in the senses before]. It is also worth emphasising that the Czech pedagogue, in the textbook *Orbis sensualium pictus* (1658), describes the museum as a study room, and the engraving illustrating

<sup>8</sup> See: SLOAN, Kim and BURNETT, Andrew (eds.). *Enlightenment. Discovering the world in the eighteenth century*. London: The British Museum Press, 2010, pp. 70–79.

<sup>9</sup> See: ARNOLD, Kenneth and PEARCE, Susan. Francis Bacon advises how to set up a museum. In: ARNOLD, Kenneth and PEARCE, Susan. *The Collector’s Voice: Critical Readings in the Practice of Collecting. Volume 2. Early Voices*. Abingdon, Oxon: Routledge, 2016, pp. 17–20.

<sup>10</sup> LOCKE, John. *Some Thoughts Concerning Education*. London: Heinemann, 1964, pp. 7–8.

<sup>11</sup> Comenius’ works, especially his textbook “*Orbis sensualium pictus*” (1658), were popular throughout Europe until the beginning of the nineteenth century.

<sup>12</sup> DURY, John. The Reformed School. In: ARNOLD and PEARCE, *The Collector’s Voice...*, pp. 47–49.

<sup>13</sup> *Ibidem* pp. 47–48.

<sup>14</sup> Regarding the method of Johann Amos Comenius, see: FIJALKOWSKI, Adam. *Orbis Pictus. Die Welt in Bildern des Johann Amos Comenius*. Warsaw: University of Warsaw, 2008, pp. 27–29.

the concept shows a man studying books alone.<sup>15</sup> In European culture, such a definition was also valid in the eighteenth century.<sup>16</sup>

Ideas initiated in early modern times were put into practice in the Age of Enlightenment. Universities were secularised and curricula were oriented towards natural sciences and practical classes.<sup>17</sup> One of the symbols of these efforts to establish a new order of sciences, which were treated as branches of general knowledge about the universe, is the French *Encyclopaedia* published in the mid-eighteenth century, edited by Denis Diderot. Researchers sought answers to questions about the nature of all things, and their research was empirical. Science was not the only important topic: “Arts and Craftsmanship” were also emphasised.<sup>18</sup> The encyclopaedia’s authors wanted to know the truth about the world, but also to learn its practical application in everyday life – in accordance with the then idea of utilitarianism. The collected curiosities of the natural world were catalogued and classified, creating natural history cabinets and botanical gardens at the same time.<sup>19</sup> These attitudes and interests were present not only in academies and among scholars: a fascination with natural sciences was also present in the social circles of the elite.<sup>20</sup> One consequence of this approach to science and education was the transition from Early Modern cabinets of curiosities to natural history cabinets and public scientific collections, often organised by educational institutions. Curiosities of the natural world were commonly collected from the middle of the eighteenth century, and the collectors were researchers conducting natural observations, herbology and geological research. Natural objects were collected, catalogued and described. It is worth emphasizing the educational nature of the phenomenon of collecting rarities of the natural world, because naturalists were engaged in exploring and researching, especially in areas that were closest to them. It was thus a transition from Early Modern curiosity to Modern inquisitiveness.<sup>21</sup>

## The Polish Case

Compared to the largest and most influential cultural centres, such as Italy, England, Germany and France, Polish education and museology developed at a much slower pace. This was not only due to the country’s geographical location, but also the difficult political situation during the Partition Period (1772–1795). Higher education remained under the firm authority of the Jesuits and the Piarists, who offered high-quality education but primarily reserved for the elite.<sup>22</sup> Modern European cultural trends emerged during the reign of Stanisław August

<sup>15</sup> COMENIUS, Johann Amos and FIJAŁKOWSKI, Adam. *Świat w obrazach rzeczy dostępnych zmysłom*. Warsaw: University of Warsaw Press, 2015, pp. 256–257.

<sup>16</sup> For more on the semantics of the concept of a *museum*, see: MENCZFEL, Michał. “Muzeum” w XVIII wieku. Z dziejów semantyki pojęcia. In: *Acta Universitatis Nicolai Copernici. Zabytkoznawstwo i Konservatorstwo*, 2021, 52, pp. 9–23.

<sup>17</sup> RÜEGG, Walter and DE RIDDER-SYMOYENS, Hilde (eds.). *A history of the University in Europe. Volume II. Universities in Early Modern Europe (1500–1800)*. Cambridge: Cambridge University Press, 1997, pp. 122–124.

<sup>18</sup> The very title of the encyclopaedia can be seen as an expression of this attitude: *Encyclopedie, ou dictionnaire raisonné des sciences, des arts et des métiers par une Société de Gens Lettres*.

<sup>19</sup> This paper presents the general European context. It should be emphasised that botanical gardens and natural history cabinets date back to the early modern period: they were popular in Italy in the sixteenth to seventeenth centuries and in the United Provinces from the seventeenth century. Krzysztof Pomian elaborated on this issue in detail. See: POMIAN, Krzysztof. *Muzeum. Historia światowa. 1. Od skarbcza do muzeum*. Gdańsk: słowo obraz terytoria, 2023.

<sup>20</sup> KOT, Stanisław. *Historia wychowania. Tom II. Wychowanie nowoczesne. Od połowy wieku XVIII do współczesnej doby*. Warsaw: Żak, 1996, pp. 3–5.

<sup>21</sup> POMIAN, Krzysztof. *Collectors and curiosities*. Cambridge: Polity Press, 1990, pp. 217–222.

<sup>22</sup> An example of such a college is the Piarist Collegium Nobilium in Warsaw, founded in 1740 by Stanisław Konarski.

Poniatowski, who ascended the throne in 1764. On the initiative of the king, the first secular academy was established: the Knights' Nobles' Academy of the Corps of Cadets, founded in 1766 and directed by Duke Adam Kazimierz Czartoryski. This academy was aimed at the moderately wealthy and poorer nobility. Hopes were pinned on the development of education for a political, social and cultural revival of the nation.<sup>23</sup> The dissolution of the Jesuit order resulted in the establishment of the Commission of National Education (KEN) in 1773, whose task was to organise the public school system.<sup>24</sup> The KEN drew on the ideals of the Enlightenment. The Acts of 1783 contain provisions concerning the organisation of, among others institutions, museums presenting didactic collections and natural history cabinets.<sup>25</sup> Due to the political situation, education became an extremely important aspect of upbringing, with the aim of shaping a sense of national identity across society and creating a lasting community. For this reason, Polish was the most important language of education in schools and history became an important tool to achieve the primary goal.<sup>26</sup> Representatives of the intellectual elite in the king's close circle emphasised the need to establish in the Republic of Poland an academy of sciences and arts, conceived in the spirit of the Enlightenment and managed by the state. Although at least a few concepts and ideas for such projects had been written, no such university was established. In 1771, on the initiative of King Stanisław August, an informal association of scholars was established; this group held scientific and literary meetings known as the Thursday Dinners.<sup>27</sup>

Together with activities aimed at the development of national education, museological thought was shaped. Although the first national museum was founded in 1801,<sup>28</sup> a text expressing the need to organise a national collection had already been published in 1766 by General Etienne Dieudonné Chardon de Rieule.<sup>29</sup> This took the form of a brochure calling on the public to collect and submit local natural specimens. The scope of this project was to be broad, and the goal was to develop the natural sciences faster and more thoroughly. This, in turn, was to result in the acceleration of the economic development of the Republic of Poland.<sup>30</sup> De

<sup>23</sup> KWIECIŃSKI, Zbigniew and ŚLIWERSKI, Bogusław (eds.). *Pedagogika. Podręcznik akademicki*. Warsaw: PWN, 2019, pp. 93–97.

<sup>24</sup> The subject was developed by BUCZEK, Katarzyna and SZYBIAK, Irena. *Komisja Edukacji Narodowej 1773–1794: szkoły w Wydziale Żmudzkiem*. Warsaw: Wydawnictwo IHN PAN, 2018; KAMIŃSKA, Janina. *Komisja Edukacji Narodowej 1773–1794: szkoły w Wydziale Litewskim*. Warsaw: Wydawnictwo IHN PAN, 2018.

<sup>25</sup> KOMISJA EDUKACJI NARODOWEJ. *Ustany Komisji Edukacji Narodowej dla stanu akademickiego i na szkoły w krajach Rzeczypospolitej przepisane. W Warszawie roku 1783*. Lviv: Seyfrath i Czajkowski, 1872, pp. 62–65 and p. 147.

<sup>26</sup> Ryszard Szreter notes that the use of history for patriotic purposes, rather than moralistic and didactic purposes, was initiated in Polish culture. See: SZRETER, Ryszard. Education for nation-saving: Poland between the partitions. In: COOK, Thomas G. (ed.). *The History of Education in Europe*. London: Methuen, 1974, p. 57.

<sup>27</sup> The meetings were attended by Ignacy Krasicki, Adam Naruszewicz, Franciszek Bohomolec, Grzegorz Piramowicz, Adam Kazimierz Czartoryski, Jan Albertrandi and Michał Jerzy Wandalin Mniszech, among others. From 1801, a significant number of the participants became the community of the Warsaw Society of Friends of Sciences. See: SMOLEŃSKI, Władysław. *Pisma historyczne. Tom II*. Krakow: Skład główny w Księgarni G. Gebethnera i spółki, 1901, pp. 42–46.

<sup>28</sup> Following Zdzisław Żygulski Jr., it is believed that it was the museum of Duchess Izabela Czartoryska née Flemming in Puławy – the Sibyl Temple.

<sup>29</sup> DE RIEULE, Etienne D. C. Projekt zgromadzenia bez żadnych wydatków wszystkich bogactw naturalnych Polski, 1766. In: DE ROSSET, Tomasz F., WOŹNIAK, Michał F. and BEDNARZ DOICZMANOWA, Ewelina (eds.). *Muzeum w kulturze pamięci na ziemiach Rzeczypospolitej Obojga Narodów. Antologia wczesnych tekstów. Tom I, 1766–1882*. Toruń: Wydawnictwo Naukowe Uniwersytetu Mikołaja Kopernika, 2020, pp. 31–37.

<sup>30</sup> See: Silva rerum (1): Early Museological Texts Polish-Lithuanian Commonwealth 1766–1882. In: *Muzeum w kulturze pamięci...*, p. 22.

Rieule's concept was in line with both Enlightenment pragmatism and utilitarianism.<sup>31</sup>

In 1786, a similar call was published by Ksawery Zubowski.<sup>32</sup> His intention was to catalogue the national collections. The register of objects with descriptions was to be divided into eight books, the fourth of which was planned as a register of "Curiosities of academies, libraries, schools, museums, etc., and these are: 1) as to mathematical, physical and astronomical instruments; 2) as to rare books; 3) as to original manuscripts, etc.; 4) any other curiosity".<sup>33</sup> The call was addressed to all those who cared for the good of the country in the context of education, culture and politics. Zubowski's project is one of the earliest European texts on the inventory of monuments.<sup>34</sup> Moreover, it is of a methodical nature, as the author provided specific guidelines as to how objects should be described. Although the royal printing house and the KEN were involved in organisational issues related to the publication of the periodical, its implementation did not come to fruition. It should be emphasised, however, that Polish eighteenth-century museological texts influenced the development of Polish collecting in the nineteenth century on a theoretical level. Although establishing a public national museum was not possible, smaller initiatives were successfully implemented, for example, school science cabinets,<sup>35</sup> botanical gardens<sup>36</sup> and cabinets/museums owned by learned societies.<sup>37</sup>

### Michał Jerzy Mniszech: Founder of the Musaeum Polonicum

Early museological texts testify to the needs of society at that time to improve the quality of education and to organise a national collection. They are also proof that Polish culture developed under European influence, while retaining its national style and adapting to the

<sup>31</sup> "Ponieważ jedyną otwartą drogą do poznania przedmiotów natury jest obserwacja poszczególnych zjawisk, ich porównywanie i kombinowanie, popatrzmy więc, dokąd ta droga może nas zaprowadzić: jedyny prawdziwy sposób postępu wiedzy przyrodniczej polega na pracy opisywania i obserwowania zjawisk, jakie odkrywamy. To jest pierwszym obowiązkiem badacza przyrody, który chce być pożytecznym" [Since the only way open to the knowledge of the objects of nature is the observation of particular phenomena, their comparison and combination, let us see where this road may lead us: the only true way of advancing natural knowledge lies in the work of describing and observing the phenomena which we discover. This is the first duty of a natural scientist who wants to be useful]. DE RIEULE, Projekt zgromadzenia..., p. 34.

<sup>32</sup> ZUBOWSKI, Ksawery. Kolekcja starożytnych i tegoczesnych osobliwości w kraiu y za kraiem znajdujących się, Naród Polski interessujących. Pismo periodyczne. Prospekt. In: *Biblioteka Warszawska. Pismo poświęcone naukom, sztukom i przemysłowi*, vol. 1 (XLIX), Warsaw, 1853, pp. 513–518.

<sup>33</sup> Ibidem, p. 516.

<sup>34</sup> More: FRYCZ, Andrzej. Początki starożytnictwa i myśli konserwatorskiej w Polsce. In: *Ochrona Zabytków*, 28/1 (108), 1975, pp. 13–22.

<sup>35</sup> One of the most interesting was the Krzemieniec collection, which consisted of a physical cabinet, an astronomical observatory and a meteorological station, a chemical laboratory and a mineralogical cabinet, a zoological cabinet and a botanical collection, a numismatic cabinet, and an art collection. Part of the collection belonged to King Stanisław August, having been purchased by Tadeusz Czacki. See: BUCZEK, Katarzyna. *Zbiory dydaktyczne Gimnazjum I Liceum Wolyńskiego w Krzemieńcu (1805–1833)*. Warsaw: University of Warsaw Press, 2016.

<sup>36</sup> A unique example is the botanical garden of Vilnius University. From 1797, it was run by Stanisław Bonifacy Jundzill, a Polish botanist educated in Vienna. The garden, modelled on the Viennese Schönbrunn, represented a high European level. See: JUNDZILL, Stanisław B. Gabinet historii naturalnej i ogród botaniczny Wileńskiego Uniwersytetu. In: *Biblioteka Warszawska*, 1850, Vol. 1. Warsaw: w Drukarni Stanisława Strąbskiego, pp. 39–59.

<sup>37</sup> In the first years of the nineteenth century, the Warsaw Society of Friends of Sciences established a Museum and Cabinet of Natural Things and a Library. The collection consisted of objects sent by the society: domestic natural specimens, tools dug up from the ground, machines, physical devices, coins, letters, books and curiosities such as "an iron rail bent in half by King August II the Strong". See: JURKOWSKA, Hanna. *Pamięć sentymentalna. Praktyki pamięci w kręgu Towarzystwa Warszawskiego Przyjaciół Nauk i w Pulawach Izabeli Czarzortyńskiej*. Warsaw: University of Warsaw Press, 2014, pp. 45–53.

possibilities of the time. The first initiative to establish a public national museum was the *Musaeum Polonicum* project, published under the title “Myśli względem założenia Musaeum Polonicum” in the magazine *Zabawy Przyjemne i Pożyteczne*<sup>38</sup> in 1775.

The author of “Myśli względem założenia Musaeum Polonicum” was Michał Jerzy Wandalin Mniszech, born in 1742 in Dziewięczyż. He was an advisor to King Stanisław August (1772–1795), a member of the Commission of National Education (1777–1779) and a Grand Marshal of the Crown (1783–1793), as well as an intellectual and collector.<sup>39</sup> He received his basic education while living in Swiss Bern (1762–1765) and subsequently undertook research trips to France, Germany, the Netherlands, England, Italy and Austria (1765–1768) under the care of a preceptor, the Helvetic naturalist Elie Bertrand<sup>40</sup> and in the company of his brother, Józef Jan Tadeusz. This Grand Tour<sup>41</sup> inculcated in him the spirit of the European Enlightenment and brought significant educational experiences.

Michał Mniszech’s travels were in accordance with the principles of the art of travelling, the so-called *ars apodemica*. Relevant guidelines are contained in the manuscript “Observations politiques et morales par Mr le comte Michel Mniszech 1762–1765”. According to the author, the key task was to determine the purpose of the educational journey, which – in his opinion – should be aimed at the good of the homeland. In addition to the student, two or three people should participate, including a tutor called a preceptor. Each of the participants was obliged to observe and take notes in accordance with personal interests and predispositions concerning 1) history, geography, economy, administration, law and politics; 2) natural history, agriculture, physics and products of the earth; and 3) arts, crafts, mechanics, industry, manufactures and commerce. It was necessary to describe the routes travelled, carry out measurements and observations, and describe, for example, the cabinets and museums visited. As a result, the travel journals had the character of a compendium of knowledge – something like a methodical guide.<sup>42</sup>

In the context of this paper, the most interesting is the last trip to Italy in 1767. The preserved “Observations” provide knowledge about what was of greatest interest to Michał Mniszech and his travel companions, preceptor Elie Bertrand and brother Józef Jan. Apart from

<sup>38</sup> *Zabawy Przyjemne i Pożyteczne* was a literary and scientific journal published in the years 1770–1777 by Michał Gröll, under the direction of King Stanisław August. It published scientific papers read during Thursday Dinners and translations of literary texts into Polish. See: PLATT, Julian. “*Zabawy Przyjemne i Pożyteczne*” (1770–1777). *Wydawnictwo Wrocław – Warszawa – Kraków: Zakład Narodowy im. Ossolińskich*, 1968, pp. XI–XXVI.

<sup>39</sup> ROSNER, Aleksander. Mniszech Michał Jerzy Wandalin. In: *Polski Słownik Biograficzny*, t. XXI. Wrocław: Polska Akademia Nauk, 1976, pp. 480–484.

<sup>40</sup> The life and educational and political activities of Michał Jerzy Mniszech and Elie Bertrand were compiled by Marek Bratuń. See: BRATUŃ, Marek. “*Ten wykwinny, wyształcony Europejczyk*”. *Zagraniczne studia i podróże edukacyjne Michała Jerzego Wandalina Mniszcha w latach 1762–1768*. Opole: Wydawnictwo Uniwersytetu Opolskiego, 2002; BRATUŃ, Marek. *Relations polono-suissees au XVIII<sup>e</sup> siècle. Nouvelles approches*. Wrocław: Wydawnictwo Uniwersytetu Wrocławskiego, 2012; BRATUŃ, Marek. *Elie Bertrand a Polska*. Wrocław: ATUT, 2013.

<sup>41</sup> Grand Tours were methodical educational journeys undertaken from the sixteenth to eighteenth centuries by wealthy young men in order to broaden their education, acquire manners, establish international contacts and prepare for political functions in the country. These young men travelled under the care of preceptors, who supervised the implementation of the educational plan. Italy, France, England, Switzerland and Germany were the most visited. In the eighteenth century, the educational nature of the Grand Tour gradually disappeared, and bourgeois trips for cognitive purposes became popular. European universities also changed their curricula to suit the needs of foreign students. For more see: RÜEGG and DE RIDDER-SYMOYENS, *A history of the University in Europe...*, pp. 431–436.

<sup>42</sup> BRATUŃ, *Relations polono-suissees...*, pp. 23–25.



monuments of architecture and art, there was particular interest in education, administration, trade and industry. The observations of Rome concern both the ancient and contemporary periods. According to the principles of *ars apodemica*, the travellers developed the content in teams, using source texts and based on conversations with local intellectuals, diplomats, bankers and merchants.<sup>43</sup> Michal Mniszech was impressed by the cultural and educational wealth of Rome. He emphasised that there is no other city in the world so scientifically and artistically developed, and that “Rome en vrai mot, devrait etre le sanctuaire des sciences, le center de la vraye eruditions, le temple des Muses et des beaux arts”<sup>44</sup> [Rome, literally should be the sanctuary of the sciences, the centre of true learning, the temple of the Muses and the fine arts]. Apart from information about colleges and how they functioned, much space was given to descriptions of libraries, though with critical remarks as to the possibilities and conditions for conducting scientific research in them.<sup>45</sup> An extremely important part of the manuscript is the tips, written in Polish, relating to the experience of staying in Italy as a Polish person and where best to get an education.<sup>46</sup> As well as information about Polish funds (scholarships), these tips deal with issues such as how to finance a stay abroad and rules for implementing such a trip. The experience gained in Italy regarding how education functioned there and how collections were used for scientific purposes certainly influenced the formation of Michal Mniszech’s mature collecting and pedagogical thought.

### Musaeum Polonicum: Didactic Facilities of the Academy of Sciences and Arts

Michal Mniszech developed the “Myśli względem założenia Musaeum Polonicum”<sup>47</sup> project seven years after returning from Italy and Austria to his hometown of Wiśniowiec. In the introduction, he expressed his belief that developing a national education is the responsibility of an enlightened government. He presented education as a way out of political and economic crises, and also as a type of capital that can educate society on the virtue of patriotism. He emphasised the merits and efforts of the KEN in this matter, but also noted that the newly established order of science and regulations for teachers were insufficient. Mniszech’s proposal was therefore to establish a museum whose didactic collection would enable scientific research and the acquisition of knowledge in a way that engaged all the senses. The most important role was to be played by the library. Mniszech proposed that the library’s books should be selected according to their utility – primarily they should be in service of education, not “vain curiosity”. He gave weight to the quality of the book collection, suggesting that the collection should mainly concern Polish science, to encourage the audience to learn about it, with special attention devoted to national history. He recommended that all important state documents “hidden” in magnate household archives should be copied and made public. In addition this conception of an archive, he also recommended creating a national encyclopaedia – very

<sup>43</sup> BRATUŃ, “*Ten wykwinntny, nykszałcony Europejczyk*”..., pp. 193–194.

<sup>44</sup> MNISZECH, Michal Jerzy Wandalin. *Observations sur Rome et l’Italie contenues dans ce volume faites depuis le 15 octobre au 15 decembre 1767* [Manuscript], p. 212.

<sup>45</sup> Ibidem, p. 219.

<sup>46</sup> Ibidem, pp. 264–277.

<sup>47</sup> MNISZECH, Michal J. W. Myśli względem założenia Musaeum Polonicum. In: *Zabawy Przyjemne i Pożyteczne*, 2(11), 1775, pp. 211–226.

much an Age of Enlightenment idea.<sup>48</sup> This activity would involve developing the foundations of all sciences, concisely explaining the meanings of scientific concepts and describing the relationships between them.<sup>49</sup> He envisaged that this would result in a faster development of education and an increased number of scientific publications, including those that could reach the general public, for example, via articles in the press. Mniszech's innovative idea, inspired by practices in other European countries, was to introduce the concept of a national repository which would receive copies of every book published in Poland. In this way, he argued, the *Musaeum Polonicum* library could present a full picture of science practiced in the country, and the collection could grow faster.

One of the most important messages of the project was the need to better understand the homeland. Carrying out geographical measurements in the Republic of Poland, identifying its natural resources and riches, and describing the history of the country were treated as priorities. The museum was to play an important role in this task by organising an exhibition space to serve educational and research functions, stimulate the minds of the visitors, ignite cognitive curiosity and enable a sensory experience of science. Mniszech's proposal should be read as an open project, focused on the development and gradual expansion of the collection.

Apart from the library, Mniszech distinguished eleven other groups of exhibits. First, he mentioned numismatics (especially national coins) and medals. The purpose behind placing such objects in the collection was to convey knowledge about their history, monetary value and varieties. He proposed treating historical coins as sources of evidence for national historical events, giving them a clear pedagogical role. Collected gems and cameos would have a similar function in his conception.

Next, Mniszech proposed a collection containing descriptions of famous cabinets and art collections, supplemented with engravings and plaster casts of sculptures. He considered the use of copies to be correct and sufficient, especially in the context of the organisational and financial limitations of the project. This issue shows that, in his view, the didactic and educational value of an exhibit did not depend on its originality.

The next group was to consist of physical instruments for conducting research in experimental physics, for example, pneumatic, electrical and optical machines as well as geometrical and mathematical devices. He then proposed a collection geographical tools and instruments such as globes, astrolabes, and telescopes, as well as maps. Here Mniszech emphasised the great need to prepare maps of The Republic of Poland, giving examples of such practices in France and

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<sup>48</sup> The need for an encyclopaedia, dictionary or lexicon in the native language resulted in the following publications: KRASICKI, Ignacy. *Zbiór potrzebniejszych wiadomości, porządkiem alfabety ułożonych*. Vol. 1–2. Warsaw-Lviv: Michal Gröll, 1781–1783; JEZIEŃSKI, Franciszek S. *Niektóre wyrazy porządkiem abecadła zebrane y stosownemi do rzeczy uwagami objaśnione*. Warsaw: Michal Gröll, 1791; LINDE, Samuel B. *Słownik języka polskiego*. Vol. 1–6. Warsaw: Drukarnia XX. Pijarów, 1807–1814.

<sup>49</sup> It should be mentioned that, from the second half of the eighteenth century, one of the greatest aspirations of Polish intellectuals was the development of a uniform, coherent scientific terminology in the national language. Such activities were undertaken not only by the KEN and the Society for Elementary Books, but also by the Warsaw Society of Friends of Sciences, as well as by independent researchers. An interesting example of the latter is Stanisław Bonifacy Jundziłł, the author of the first Polish textbook on botany. See: JUNDZIŁŁ, Stanisław B. *Opisanie roślin w prowincji Wielkiego Księstwa Litewskiego naturalnie rosnących według układu Linneusza*. Vilnius: Drukarnia XX. Pijarów, 1791.

England.<sup>50</sup>

Mniszech also proposed a collection of anatomical models, postulating that these would aid in the development of the science of obstetrics. For Mniszech, an example worth following was the anatomical collection of Ercole Lelli, an Italian sculptor and anatomist. From 1742, it was housed in the Anatomy Museum of the Bologna Institute (L'Accademia delle scienze dell'Instituto di Bologna), where a practical school for midwives was also established.<sup>51</sup> For the Musaeum Polonicum, wax models would suffice.

Another important collection was models of machines used to facilitate work in agriculture and factories. In proposing this, Mniszech's aim was to support the modernisation of the national economy as well as to improve working conditions and facilitate production. Next, the author proposed a collection of portraits of famous Poles, whom he listed along with descriptions of their merits and the characteristics of the times in which they lived. These heroes were to be presented as role models, supporting the educational function of this gallery.

As the last part of the collection, he planned a natural history cabinet consisting of groups of domestic geological specimens, soils, minerals, plants and animals. Each group would be accompanied by a description that included its place of occurrence in the Republic of Poland. In the case of all collection items, he allowed the use of copies, models or images (such as engravings). Animal specimens – or their likeness – were to supplement the texts of George Buffon and other naturalists. Mniszech divided plants into those that were “interesting” or “useful”, noting that the latter should be provided with a methodical description and practical instructions for their cultivation and use.

The museum, although sparingly planned, required funding. Mniszech estimated the amount required for its establishment would be 20,000 Polish zlotys, expressing hope for further funding by Polish society, especially the elite, giving the example of the organisation of the British Museum.<sup>52</sup> He also emphasised that while Western institutions were an example worth following, in Poland's case, reaching Italian or British levels was not realistic. He advised using cheaper and easier means that would still bring similar benefits to the development of national education.

All groups of objects that make up the Musaeum Polonicum collection can be assigned to larger sections concerning: 1) the arts and humanities, with an emphasis on works in Polish or by Polish artists; 2) natural sciences; 3) economy and agriculture. On a general, or international level, this classification makes it possible to observe the interdependence of the museum collection and the Enlightenment order of science. At the local level, concerning the Polish case, there is a noticeable connection between Michał Mniszech's museum project and the

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<sup>50</sup> Michał Mniszech's interest in geographic measurements is evidenced by meticulous records of calculations kept in his travel diaries. See, e.g.: MNISZECH, Michał J. W. *Routes contenues dans ce VOLUME. De Rome, Varsovie à Wisniowiec. Depuis le 15 D10<sup>bre</sup> 1767 jusqu'au 7 Juillet 1768* [Manuscript]. Krakow: Biblioteka Jagiellońska.

<sup>51</sup> FIELD, Judith V. and JAMES, Frank A. J. L. *Renaissance and Revolution: Humanists, Scholars, Craftsmen and Natural Philosophers in Early Modern Europe*. Cambridge: Cambridge University Press, 1997, p. 231.

<sup>52</sup> MNISZECH, Myśli względem założenia..., p. 218.

Enlightenment conception of the academic study of sciences and arts.<sup>53</sup>

The educational and didactic dimension of the Musaeum Polonicum project has been noted by contemporary researchers in the field of museology.<sup>54</sup> Interpretations often draw similarities to the British Museum – not only because of the direct reference in the source, but also due to the description preserved in one of the travelogues. One important research clue is Mniszech’s mention of the project to establish a national academy, which had been submitted at the time of writing, although it is not clear which concept he refers to. This is an important research problem that requires further in-depth archival research. Eighteenth-century sources on Polish culture contain information about the need to establish a secular scientific institution.<sup>55</sup> Such projects appeared from the reign of King August III and, according to Władysław Smoleński, they continued to be submitted until 1776.<sup>56</sup> One of the first was Wawrzyniec Mitzler de Kolof’s proposal to found a Collegium Medicum (1752). Despite receiving the approval of the King and the Great Chancellor of the Crown, Jan Małachowski, the university was not established. In 1756, the same scholar founded the *Instituti literarii varsaviensis* association, whose activities mainly involved importing books and periodicals from abroad.<sup>57</sup>

Apart from Mitzler de Kolof, an important role in the development of Polish culture and education was played by Józef Andrzej Załuski. According to Adam Jocher and Józef Majer, he proposed a plan for an academy of sciences, entitled “Plan pour l’établissement d’une Academie des Sciences”;<sup>58</sup> however, this fact remains conjectural.<sup>59</sup> This plan, of unknown date, was found in the Vilnius University Library. It proposes the creation of three classes: natural history, experimental physics and mathematics, as well as organising, among other things, an astronomical observatory, a room for physical experiments, a botanical garden, an anatomical theatre, a room for “nature curiosities” and a chemical laboratory. However, the strongly scientific nature of the proposed academy raises doubts as to the attribution of

<sup>53</sup> Before the announcement of the creation of the academy appeared in the pages of *Zabany...* in the Musaeum Polonicum project, an announcement regarding this matter was published in *Monitor*, edited by Wawrzyniec Mitzler de Kolof in 1768, mentioning that “Ucieszyła niezmiernie wszystkich naukę kochających pogłoska [...], iż ma być wkrótce Akademia, albo Towarzystwo ludzi uczonych dla wydoskonalenia języka polskiego ustanowione” [Everyone who loves science was very pleased with the rumour [...] that an Academy or a Society of Scholars was to be established soon to improve the Polish language]. In: BOHOMOŁEC, Franciszek, and Ignacy KRASICKI. *Monitor* [online]. 16 April 1768, (XXXI), p. 1. <https://dbc.wroc.pl/dlibra/publication/5113/edition/4911/content>

<sup>54</sup> See, e.g.: HAPANOWICZ, Piotr. Musaeum Polonicum Michała Jerzego Wandalina Mniszcha. In: *Rocznik Biblioteki Kraków*, V/2021, pp. 369–391; MENCFEL, Michał. The English voyage of Michał Jerzy Wandalin Mniszech and plan to found the Polish museum. In: *Muzealnictwo*, 2021, 62, pp. 214–219.

<sup>55</sup> Józef Majer wrote an interesting article about projects and scientific societies. See: MAJER, Józef. Uwagi nad zadaniem akademii w powszechności tudzież historyczny przegląd towarzystw naukowych w Polsce. In: *Dwa pierwsze publiczne posiedzenia Akademii Umiejętności w Krakowie: 1. Posiedzenie w przeddzień czterechsetnej rocznicy urodzin Mikołaja Kopernika d. 18 lutego 1873. 2. Posiedzenie inauguracyjne d. 7 maja 1873*. Krakow: Wyd. staraniem Akademii, 1873, pp. 46–66.

<sup>56</sup> SMOLEŃSKI, *Pisma historyczne...*, p. 55.

<sup>57</sup> *Ibidem*, pp. 20–22.

<sup>58</sup> JOCHER, Adam. *Obraz bibliograficzno-historyczny literatury i nauk w Polsce, od wprowadzenia do niej druku po rok 1830 włącznie*. Vilnius: nakładem i drukiem Józefa Zawadzkiego, 1830, p. LXXVI.

<sup>59</sup> Jan Bernoulli’s notes from his stay in Warsaw in 1778 provide an interesting clue. Describing the Załuski Library, he included a note about the life of Józef Andrzej Załuski. In it, he mentioned a plan to establish a secular academy where the Polish language, history and archaeology would be taught. However, this description does not match with the project discussed here. See: LISKE, Xawery. *Cudzoziemcy w Polsce*. Lviv: Nakładem Gubrynowicza i Schmidta, 1876, p. 229.

the idea to Józef Żaluski,<sup>60</sup> given that he was the founder of the religious society Academia Mariana (1753).<sup>61</sup>

An extremely important but often overlooked proposal was the “Projet pour l’établissement d’une Academie des Science et des Arts utiles a Varsovie en 1766”, submitted by Elie Bertrand to King Stanisław August in 1766. The text was found in 1978 by Bolesław Kumor in the Archives of the Diocese of Warmia in Olsztyn, in the documents left by Bishop Ignacy Krasicki.<sup>62</sup> In his introduction to the project, Bertrand emphasised the need to establish an academy of sciences in Poland. Similarly to the one attributed to Żaluski, it was to be divided into three departments. In this case, however, the first of these covered the Polish language and literature. The second included mathematics, physics, mechanics and natural history and was to include natural history cabinet containing national collections. The third class was rural economy and agriculture. Bertrand emphasised the need to conduct national research and undertake projects to tackle problems in the domestic economy. Governance and funding were to come from the state, with the support of an education commission.<sup>63</sup> An important aspect of the proposal was the details of the organisation of the natural history cabinet, which was to be a national collection owned by the public, managed by a curator, on the model of the British Museum. In addition, a request was made for a collection of curiosities by the Governor of Vilnius, Michał Kazimierz Ogiński, and the Mniszech brothers.<sup>64</sup>

Władysław Smoleński – supported by Julian Platt, among others – presumes that it was Żaluski’s project that was mentioned in the introduction to “Myśli względem założenia Musaeum Polonicum”. At that time, both authors were unaware of Elie Bertrand’s concept, which in ideological and programmatic terms turns out to be more in line with Michał Mniszech’s work. It is worth noting that Bertrand was also a collector – he had his own collection, part of which he donated to Michał Mniszech during his Berne education in the years 1762–1765. While travelling around Europe, they both visited academies with didactic collections, botanical gardens, private natural history cabinets and museums. E. Bertrand’s project was in line with the international Enlightenment style. Bertrand completed his project in Warsaw, during a break between educational trips.<sup>65</sup> Therefore, I consider it certain that Mniszech knew both Bertrand’s views on education and collecting and his master’s own research.

Although this issue requires separate research, it is worth mentioning that King Stanisław August also intended to establish an academy of fine arts.<sup>66</sup> The project, or rather the proposal

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<sup>60</sup> These doubts were expressed by W. Smoleński. See: SMOLEŃSKI, *Pisma historyczne...*, p. 54.

<sup>61</sup> This activity was critically summarised by Mitzler de Kolof: *Acta Litteraria Regni Poloniae et Magni Ducatus Lithuaniae. 1775, trimestre 1–4*, p. 36.

<sup>62</sup> As established by Bolesław Kumor, followed by Marek Bratuń, the project was evaluated by Krasicki. The text was written in French, and its authorship was confirmed on the basis of correspondence research and other archival sources. See: BRATUŃ, *Elie Bertrand a Polska*, pp. 51–52.

<sup>63</sup> The task of the commission was also to take over and make available the Żaluski library, which in 1761 was handed over to the Jesuits. In addition, a plan to establish a printing house and a bookstore that would sell scientific literature was taken into account. See: BRATUŃ, *Elie Bertrand a Polska*, pp. 57–61.

<sup>64</sup> BRATUŃ, *Elie Bertrand a Polska*, p. 165.

<sup>65</sup> *Ibidem*, pp. 21–22.

<sup>66</sup> For more, see: MAŃKOWSKI, Tomasz. *Galerja Stanisława Augusta*. Lviv: Wydawnictwo Zakładu Narodowego im. Ossolińskich, 1932, pp. 17–18.

for this institution, was developed by Michał Mniszech, probably in the early 1770s.<sup>67</sup> He emphasised that the success of this undertaking would depend primarily on selecting the right people, and on their zealous work and commitment. The institution's aims were particularly focused on social benefits – improving the living conditions of the poor nobility and representatives of “the people” by enabling them to acquire education and practical skills. The plan included competitions for foreign scholarships, which funded three-year stays in Italy and one-year stays in France. Another aim was to create a national collection of works of art, including the works of the most outstanding students, especially those sent back by students who were studying abroad. The scientific faculty was ultimately to consist of Polish teachers – here, as in other proposals, Mniszech's patriotic motives are visible. Ultimately, however, the Academy of Fine Arts was not established in the eighteenth century.

## Conclusion

Musaeum Polonicum was planned as a complementary part of an academy of sciences and arts, therefore it is impossible to understand the idea and its significance without referring to the educational projects of its era. In contemporary discourse, this unrealised idea should be considered not as an “end” in itself but as an important testimony of society's attitude towards the world of that time.<sup>68</sup>

The presentation of Michał Jerzy Mniszech's concept as the didactic background of the academy confirms the thesis that museological thought developed together with pedagogical thought. The national museum was treated as a response to the needs of developing education, and even as a necessary condition for this development. Examples of Polish projects show the relationship between research cabinets, didactic collections and educational institutions. This statement is reinforced by the fact that for over a century and a half, museology has been recognised as a discipline within the philosophy and history of science,<sup>69</sup> and researchers place it among the educational sciences. The aim of museum practices is therefore to disseminate knowledge and methodically transfer it to the recipient.<sup>70</sup> However contemporary research on the history of Polish museology still lacks an educational perspective, which would involve, for example, embedding phenomena in the context of the history of pedagogical thought or presenting the presence of pedagogical ideas in the activities of collectors. The use of such a methodology allows us to understand which tradition modern museology arose from, an important distinction give we are the direct heirs of that tradition today. Enlightenment-era pedagogical thought can also be an inspiration for discovering the educational potential of contemporary museum exhibitions.

<sup>67</sup> MNISZECH, Michał J. W. Projekt ustanowienia Akademii Sztuk Wyzwolonych przelożony królowi Stanisławowi Augustowi przez Michała Wandalina Mniszcha marszałka w. kor. In: RASTAWIECKI, Edward. *Słownik malarzów polskich tudzież obcych w Polsce osiadłych lub czasowo w niej przebywających. T. 1*. Lviv: Wydawnictwo Zakładu Narodowego im. Ossolińskich, 1932, pp. 313–321.

<sup>68</sup> In addition to metamuseology, it is also important to refer to musealisation, a concept developed by Z. Stránský in his later research work. Three stages of this phenomenon can be distinguished: selection, which involves identifying the museum potential “hidden” in objects; “thesaurisation” – transferring the object to a new museum reality; and communication, which is the process of gaining meaning, sharing and disseminating scientific, cultural and social values. Although, according to this theory, the Musaeum Polonicum did not fully communicate with the reality of that time, on an ideological level a pedagogical selection and thesaurisation of museum objects was made. SOARES, Zbýněk Z. *Stránský*, pp. 82–83.

<sup>69</sup> POPADIĆ, Milan. The beginnings of museology. In: *Muzeológia a kultúrne dedičstvo*, 2020, 8(2), 2020, p. 6.

<sup>70</sup> *Ibidem*, p. 12.

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# Protection of Visual and Architectural Heritage Based on the Implementation of the Living Museum Concept in the Cracow Stained Glass Factory

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*Protection of Visual and Architectural Heritage Based on the Implementation of the Living Museum Concept in the Cracow Stained Glass Factory*

This article focuses on the concept of a living museum based on the Stained Glass Factory in Cracow. It examines how such a museum can integrate elements of real life into the exhibition, creating a unique experience for visitors. By examining the intersection of traditional craftsmanship and contemporary engagement strategies, the paper delves into the potential of revitalising cultural heritage. The study investigates the impact of such a concept on preserving and promoting the rich legacy of stained glass artistry, providing insights into the viability and enriching potential of this concept for both the local community and visitors. The conducted research also aims to trace the historical significance of stained glass in Cracow's architecture and how the museum concept affects the dissemination of this knowledge.

Keywords: living museum concept, stained glass factory and museum, museum architecture, experience for visitors, visual heritage

## Introduction

The living museum concept aims to create a more immersive and memorable experience for visitors, fostering a deeper understanding and appreciation of history and culture. The concept of a living museum refers to a type of museum that goes beyond the traditional role of preserving and displaying artifacts or exhibits. Instead, a living museum aims to recreate and immerse visitors in a particular time period, historical event or cultural setting by incorporating live demonstrations, interactive activities and a dynamic environment. The goal is to provide a more engaging and authentic experience for visitors, allowing them to actively participate in the historical or cultural context. The term “living” reflects the idea that these museums bring history or cultural heritage to life in various ways. Living museums can cover a wide range of themes, from historical periods to specific cultural traditions. The goal is to provide a more engaging and memorable experience for visitors, fostering a deeper connection to the subject matter and a better understanding of historical or cultural contexts.

There are many possibilities for implementing these solutions, discussed by cultural organisations,<sup>1</sup> scientists,<sup>2</sup> curators and museum workers.<sup>3</sup> The initial manifestations of the modern concept of a living museum originated in the form of the living history museum.<sup>4</sup> Scott Magelssen describes examples of institutions that practice “costumed interpretations” at reconstructed or restored sites that portray specific historical periods for educational purposes,<sup>5</sup> categorising such activities as “Living History Museum”. These actions are intended to imitate reality, although in such cases it is a kind of performance activity.<sup>6</sup> In this aspect, the concept of a living museum can be categorised as a form of theatre. Costumed historians bring history to life by engaging in interactions that forge connections with the social, cultural and political aspects of the past. Living history sites employ two distinct forms of costumed interpretation: first-person and third-person interpretation.

In first-person interpretation, the costumed historian embodies a particular historical character, adopting speech patterns, mannerisms and attitudes relevant to that character. As interpreters represent historical figures from specific time periods, their interactions with the public are confined by the knowledge and perspective of their designated character and historical era. This is an effective method used to bring history to life at museums and at historic sites.<sup>7</sup>

Third-person interpretation frees the costumed historian from the constraints of embodying a specific historical character or time period, allowing them to maintain a comprehensive understanding of both the past and present. Instead, they portray a specific gender, profession or social status. This implies that they never try to adopt a character persona and openly recognise their role as a contemporary museum or park guide. In this scenario, the costume is treated similarly to an employee uniform. The primary benefit of third-person interpretation is that interpreters can comfortably explore a wide range of topics without being constrained by the necessity to stay in character.<sup>8</sup>

Living history museums provide a closer connection to the human aspects of our shared history.<sup>9</sup> By engaging with real individuals, we gain a deeper insight into the lives and skills people experienced. These museums offer a glimpse into the past, making the exploration of living history an enjoyable way to learn about bygone eras. Today, living history is closely associated with social history, delving into the lives of ordinary people and everyday experiences.

<sup>1</sup> UNESCO. The Modern living museum: some reflections and experiences. In: *Museum International*, Vol. XXVII, 1975, No. 2, pp. 51–89.

<sup>2</sup> PAN, Ying, HE, Li, SHI, Ying. Practice of “Living Museum” in the Traditional Architecture Culture Protection and Renewal in South Fujian. In: *Applied Mechanics and Materials*, Vols. 209–211, 2012, pp. 98–102.

<sup>3</sup> MUZAINI, Hamzah. Rethinking the living museum concept “from below”. In: *Journal of Cultural Geography*, vol. 38, 2020, No. 1, pp. 81–101.

<sup>4</sup> ANDERSON, Jay. *Time Machines: The World of Living History*. Nashville: American Association for State and Local History, 1984.

<sup>5</sup> MAGELSSSEN, Scott. *Living History Museums: Undoing History through Performance*. Toronto: The Scarecrow press, inc., 2007, p. 22.

<sup>6</sup> MAGELSSSEN, Scott. Living History Museums and the Construction of the Real through Performance. In: *Theatre Survey*, vol. 45, 2004, No. 1, pp. 61–74.

<sup>7</sup> ROTH, Stacy Flora. *Past Into Present: Effective Techniques for First-Person Historical Interpretation*, Michigan, University of North Carolina Press, 1998.

<sup>8</sup> ANDERSON, Jay. *Time Machines...*, p. 195.

<sup>9</sup> ROMO, Anadelia. *Brazil's Living Museum Race, Reform, and Tradition in Bahia*. USA: The University of North Carolina Press, 2010.

In Europe, open-air museums serve as natural venues for living history programmes.<sup>10</sup> These museums showcase everyday tools and recreations of daily life within historical architecture. The outdoor surroundings often feature period-appropriate plants, animals and architectural settings that align with historical themes. Interpreters, attired in period costumes, either act out roles or present information in the first or third person, offering insights into the past. Museums of this type create a certain visitor experience.<sup>11</sup> Through first- and third-person narratives, along with costumes and props, the aim is to deliver the best possible experience of visiting the museum.

However, when considering creations of this type, it is important to take into account the concept of authenticity. The word authentic itself can first of all be considered, accordingly with different aspects of its definition, as referring to something of indisputable origin or simply something that is not a copy. Nevertheless, relating authenticity to heritage is a multi-threaded issue.<sup>12</sup> Heritage evolves, practices change and social perception becomes different. Designating something as authentic cannot mean anchoring it in the past in order to prevent change and evolution. The concept of authenticity is also discussed by exhibition curators.<sup>13</sup>

The museum may be considered as a type of frame that is frozen at some point of development. In such a museum we will see a given space, and it can be interesting in many aspects. However, it is always a frozen slice of time, like a still life, which is static and viewed from a given distance. We might see some architectural space, for example a factory, its contents or other artifacts. But is it an “authentic” factory without the people who work in it? A factory is a dynamic place, workers talk to each other, artists create and people come and go. Certain elements move or break, and there are characteristic sounds and smells. A museum space is perceived through all human senses: we watch and we listen, but it is best when visitors can engage other senses, including touch and even smell. A museum that we can categorise as living should engage as many senses as possible. In these aspects, the dynamics of change in a museum can be compared to those of a living organism that is evolving:<sup>14</sup>

Every piece of knowledge is kept alive by continuously replacing the old with the new. In this respect, the museum, understood as a hub for the institutionalized negotiation of knowledge, might be regarded as a living organism. To perform their function and in the very process of renegotiating their internal and external relationships, museums themselves undergo a process of change, in interaction with and relation to manifold stimuli both exogenous and endogenous. These stimuli include the acquisition of new data, new scientific hypotheses and results, new objects, new instruments of inclusion and public engagement, new research, new juridical and administrative rules, organizational forms or arrangements as well as the new needs, ways of accessing the museum, and contextual knowledge generated by different types of publics.<sup>15</sup>

<sup>10</sup> RYCHNOVÁ, Lucie, MATURKANIČ, Patrik, SLOBODOVÁ NOVÁKOVÁ, Katarína, PAVLIKOVA, Martina. Open-air Museums: The Future of the Presentation of Spiritual and Architectural Heritage. In: *Muzeológia a kultúrne dedičstvo*, vol. 10, 2022, Is. 1, pp. 5–18.

<sup>11</sup> BERNARD, Elisa. “Living Museums” and societal change: The National Museum of Palermo between the 1860s and the 1950s. In: *Mare Internum*, vol. 14, 2022, pp. 9–25.

<sup>12</sup> WOOD, B. A Review of the Concept of Authenticity in Heritage, with Particular Reference to Historic Houses. *Collections*, vol. 16, 2020, No. 1, pp. 8–33.

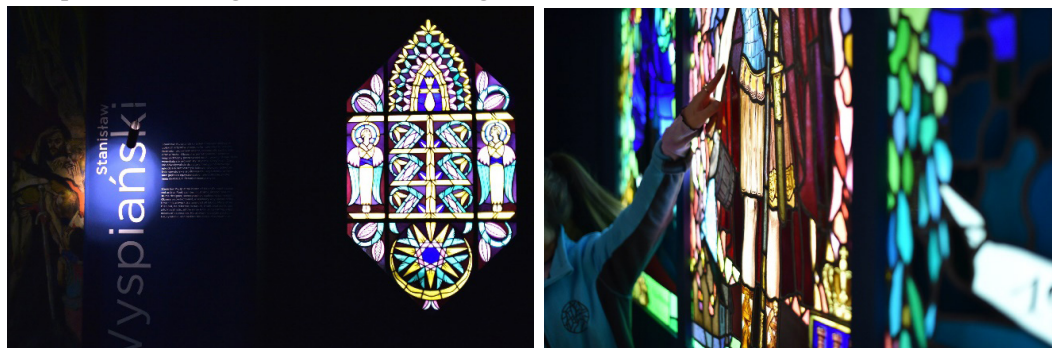
<sup>13</sup> VENTURINI, Anna. Constructions of Authenticity at Scottish Historic House Museums. *Collections*, vol. 16, 2020, No. 2, pp. 139–161.

<sup>14</sup> BERNARD, Elisa, CATONI, Maria Luisa. Museums as Living Organisms: Temporality and Change in Museum Institutions. In: *Studies on the Value of Cultural Heritage*, vol. 26, 2022, pp. 109–139.

<sup>15</sup> *Ibidem*, p. 113.

## Visual and Architectural Heritage

In sacred architecture, stained glass began to appear primarily from the tenth century, becoming an inseparable part of temple decorations and an important element of visual heritage.<sup>16</sup> In the following centuries, in Gothic times, the area of windows in churches was gradually increased. Larger windows with stained glass led to more light-filled and impressive interiors in structures such as cathedrals. The intricate designs and vibrant colours of these windows were not just beautiful to look at, but they also often told stories, serving a didactic purpose. The construction of new temples and the renovation of existing ones contributed to the spread and rising standard of stained glass art.



**Fig. 1 and 2:** *Impact through visual activities on the recipient in the stained glass factory and museum in Cracow.* Photograph by author, 2023.

Stained glass has become an element that satisfies the natural human need for beauty, not only in sacred architecture. An example of such decoration is the stained glass windows in Cracow tenement houses that have been created over many years. They decorate gates and front gate transoms, as well as important public buildings.<sup>17</sup> It is worth noting that achievements in this field are artistically extremely diverse. The presentation of several stained glass artists and their achievements is always a choice dictated by both the scope of the study and the author's subjective feelings. However, light is always an essential element. Through the action of light, the stained glass window affects the viewer in a special and multi-threaded way.<sup>18</sup> The play of light and shadow is also used as a means for the transmission of ideas in the stained glass factory and museum in Cracow (figures 1 and 2).

## Stained Glass Factory in Cracow

The Workshop and Stained Glass Museum stands as the longest-running establishment of its kind in Poland, situated within the original building constructed specifically for the Stained Glass Workshop. Founded in 1902 by Władysław Ekielski and Antoni Tuch, it has become a leading company in the field of stained glass. In 1904, the company was joined by Stanisław Gabryel from Żelanka Żeleński, an architect who took over the plant in 1906. In 1907, he registered the plant as a general partnership as “Krakowski Zakład Witrażów, Oszkleń Artystycznych i Fabryka Mozaiki Szklanej S.G. Żeleński” – the common abbreviation

<sup>16</sup> ŻYCHOWSKA, J. Maria. O współczesnych witrażach sakralnych. In: *Saeculum Christianum*, vol. 10, 2003, No. 2, p. 69.

<sup>17</sup> PAWŁOWSKA, Krystyna. *WITRAŻE KRAKOWSKIE w kamienicach mieszkalnych i obiektach użyteczności publicznej z przełomu wieków XIX i XX*. Kraków-Legnica, Stowarzyszenie Miłośników Witraży ARS VITREA POLONA. 2018, p. 10.

<sup>18</sup> OSTROWSKI, Piotr. *Wyspiąński. Spełnione dzieło / A vision realised*. Kraków: Fundacja Muzeum Witrażu. 2021.

being “S.G. Żeleński”. In the following years the plant quickly gained artistic and financial recognition, and its products reached not only Cracow and Galicia, but also other regions of Poland and European countries, and even America. Stanisław Gabriel Żeleński transformed the plant into a large company, winning awards at international exhibitions. The plant building at Aleja Zygmunta Krasieńskiego 23 was designed for the effective production of stained glass on a larger scale. The most outstanding Polish artists of the early twentieth century collaborated with the Stained Glass Factory in Cracow. It was here that the most outstanding works of Polish stained glass art were created.

In the process of creating stained glass, apart from the project itself, establishing cooperation between the artist and the workshop is crucial. The cooperation of the designer with the craftsmen and the studio where the work is created is an essential element to properly reflect the artist’s intentions. Outstanding Polish designers, such as Wyspiański, Mehoffer, Bukowski and Frycz, have repeatedly emphasised the importance of this cooperation in a well-equipped studio. This not only enables the designer’s intentions to be faithfully implemented, but also gives the author the freedom to make changes to the design while creating the work.

The stained glass windows from the plant were used to decorate, among others, the Franciscan church in Kraków (Blessed Salome and St Francis of Assisi, designed by Stanisław Wyspiański) and Wawel Cathedral (including Józef Mehoffer’s stained glass windows).<sup>19</sup> The studio received numerous orders for the production of works of art, such as Wyspiański’s Apollo Chained and Mehoffer’s Vita Somnium Breve. Among the countless stained glass windows created for secular buildings, the following are worth mentioning: the State Bank in Mendoza, Argentina (1909, designed by Jan Bukowski), the seat of the Technical and Industrial Museum in Cracow (1913, designed by Wojciech Jastrzębowski), Miejska Kasa Oszczędności in Cracow (1932, designed by Józef Mehoffer) and the Savings Bank in Bielsko (1938, designed by architect W. Gartenberg). The plant appeared in its own pavilion at the General National Exhibition in Poznań (May–September 1929). This pavilion was honoured twice with visits by the President of the Republic of Poland, Prof. Ignacy Mościcki. Żeleński’s plant was awarded the highest distinction for its exhibits, the Grand Gold Medal.<sup>20</sup> Stained glass windows were also made for many tenement houses, villas and manors in Cracow and other cities, which constituted an important input to their visual and architectural heritage. Żeleński contributed to the development of the company, gaining customers both in Poland and abroad. His efforts resulted in artistic and financial success, as evidenced by numerous awards at international exhibitions. After Żeleński’s death in 1914, the plant was run by his wife, Iza Żeleńska, and then by their descendants until the end of World War II. Today, the plant houses the Stained Glass Workshop and Museum, founded in 2004 by Piotr Ostrowski.

The Stained Glass Factory in Cracow played a key role in shaping Polish visual culture, which retains its unique artistic character to this day. However, currently stained glass art is not as popular as it used to be, which means that the number of orders for stained glass windows is much smaller. For this reason, functional transformations in the spirit of the living museum concept have allowed this place to retain its character. The interiors have not been changed for years, and what’s more, stained glass windows are still produced here in a classic form (figures

<sup>19</sup> NOWAKOWSKA-SITO, Katarzyna. *Między Wawelem a Akropollem. Antyk i mit w sztuce polskiej przelomu XIX i XX wieku*. Warszawa, Historia pro Futuro, 1996.

<sup>20</sup> KRAKOWSKI ZAKŁAD WITRAŻÓW (1929). *Krakowski zakład witrażów oszkleń artystycznych i fabryka mozaiki szklanej w Krakowie S. G. Żeleński*, Cracow, accessed December 1, 2023. <https://bc.radom.pl/dlibra/publication/35208/edition/34121/content>, pp. 12–13.

3 and 4). Visitors have the opportunity to witness artists in action and immerse themselves in the ambiance where such prominent figures as Wyspiański and Mehoffer brought their projects to life.



**Figs 3 and 4:** *Cracow Stained Glass Factory in 1936*<sup>21</sup> and *nowadays*<sup>22</sup>

The concept of a living museum is combined with many different forms of visit (table 1).

**Tab. 1:** Possible types of museum visit in Stained Glass Factory and Museum in Cracow

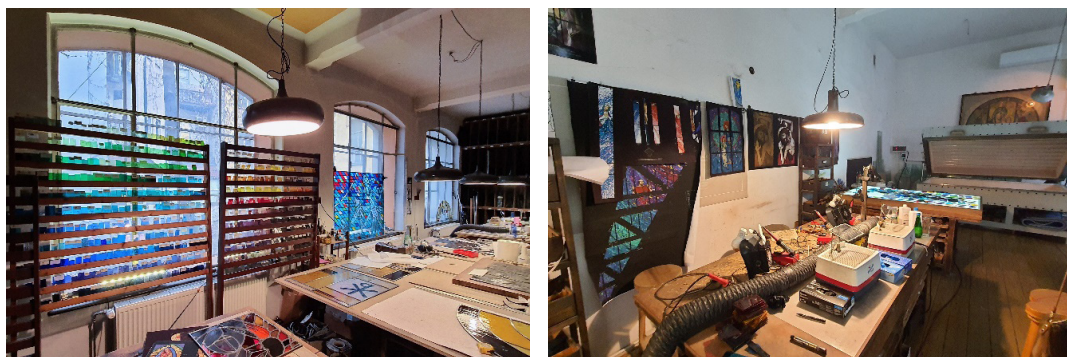
Visit type	Museum role	Visitor activity
Guided tours	<ul style="list-style-type: none"> <li>• Educating the public about stained glass art and its significance;</li> <li>• Fostering a greater appreciation for stained glass art, encouraging visitors to recognise its historical and artistic value;</li> </ul>	<ul style="list-style-type: none"> <li>• Observe the intricate process of crafting stained glass, from design to cutting and assembly;</li> <li>• Learn about the different styles, periods and themes represented in the collection;</li> </ul>
Museum lessons for secondary schools	<ul style="list-style-type: none"> <li>• Interactively lecturing on a selected topic, prepared specially for young people;</li> <li>• Creating a dynamic and engaging atmosphere during lessons;</li> </ul>	<ul style="list-style-type: none"> <li>• Watch films, solve riddles, learn unknown facts;</li> <li>• Ask questions and seek clarification about specific aspects of stained glass art;</li> </ul>
Art workshops for organised groups	<ul style="list-style-type: none"> <li>• Giving encouragement to appreciate the artistic significance of stained glass pieces;</li> <li>• Facilitating interactive learning experiences, encouraging participants to ask questions, engage in discussions and interact with the exhibits;</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the symbolism, religious or cultural themes and unique artistic expressions found in the artworks on display;</li> <li>• Gain a deeper understanding of the historical context and significance of stained glass art and its role in architectural and cultural heritage;</li> </ul>
Stained glass workshops for organised groups	<ul style="list-style-type: none"> <li>• Providing all necessary materials, including hand-blown stained glass;</li> <li>• Organising live demonstrations by skilled artisans, showcasing the step-by-step process of creating stained glass.</li> </ul>	<ul style="list-style-type: none"> <li>• Try hand at stained glass techniques under skilled artisanal guidance;</li> <li>• Gain an understanding of the craftsmanship involved in creating these intricate artworks.</li> </ul>

<sup>21</sup> Accessed December 1, 2023, <https://audiovis.nac.gov.pl/obraz/64885:1/>.

<sup>22</sup> Photograph by author, 2023.

Thanks to the museum, the building has retained its former, classical function. Therefore, the concept of a living museum contributes to the preservation of the architectural heritage in the form of a factory building and the promotion of the visual heritage of stained glass art. Through the concept of a living museum supporting the factory's activities, the plant is still operating and is able to fulfil possible orders for stained glass art.

The Stained Glass Museum in Krakow is a cultural institution that offers visitors the opportunity to learn about the history, production techniques and meaning of stained glass. The tour consists of two parts: visiting the stained glass workshop and visiting the stained glass gallery. Due to the concept of a living museum, visits are only possible with a guide. The museum is the place of daily work of stained glass artists who create new stained glass windows (figures 5 and 6).



**Figs 5 and 6:** *Visitors observe real process of crafting stained glass, from design to cutting and assembly in the Stained Glass Factory in Cracow.* Photograph by author, 2023.

The stained glass studio at the Stained Glass Museum in Krakow is a place that impresses with its architecture and functionality. The interior layout is adapted to the needs of stained glass artists. All tools and materials are easily accessible and the space is well ventilated. Large windows provide natural light, which is essential for creating stained glass windows. The room in which the stained glass gallery is located has been specially designed to display the works in the best light. The stained glass workshop at the Stained Glass Museum is a place that combines tradition with modernity. During the tour, we observe the sequential stages of creating a stained glass window, from concept to final implementation in a real stained glass factory. The guided tour lasts approximately one hour. The guide shows the group the workshop and talks about the history of stained glass, its production techniques and the most important representatives of stained glass art. Visitors have the opportunity to observe how employees make stained glass. Techniques and methods of execution are presented. Participants go through all the basic stages of creating stained glass: from cutting glass to framing and soldering, observing the work of experienced artists. Then, visitors move on to subsequent rooms containing the museum's collections.

Shortened workshops may be held after the tour. The workshops take place in a historic factory, which has been a place where beautiful stained glass windows have been created for over a hundred years. Workshop participants have the opportunity to work under the supervision of experienced stained glass artists who will teach them the secrets of this beautiful craft. Each workshop participant receives all necessary materials, including hand-blown stained glass. Under the supervision of an instructor, participants will make their own small stained glass



window, which will be a great souvenir from Cracow. The workshops are intended for people of all ages, regardless of experience. This is the perfect opportunity to learn the secrets of stained glass art and create something beautiful with your own hands.

Implementing museum lessons for high school students involves creating a learning experience that is both informative and engaging, tailored specifically for young students. The approach begins with interactive lectures on selected topics, designed to capture students' attention and deepen interest in the topic. For example, a session on stained glass art would not only present facts but would actively engage students through a dynamic atmosphere. This can be achieved by incorporating multimedia elements such as videos that provide visual and contextual background on the techniques and history of stained glass. Additionally, the inclusion of exercises such as puzzles related to the lecture content encourages critical thinking and remembering information. An important element of these lessons is the opportunity for students to ask questions and seek explanations. This not only helps to resolve any misunderstandings, but also promotes interactive dialogue between teachers and students, making the learning process more personalised and effective. By integrating these elements, museum lessons for high school students can transform traditional lectures into an engaging learning experience, supporting both educational enrichment and lasting interest in art. The most important element is that these activities are carried out in the artists' specific work spaces. Classes are conducted by a team of experienced artists, so it is also an opportunity to stimulate creativity and develop manual skills.

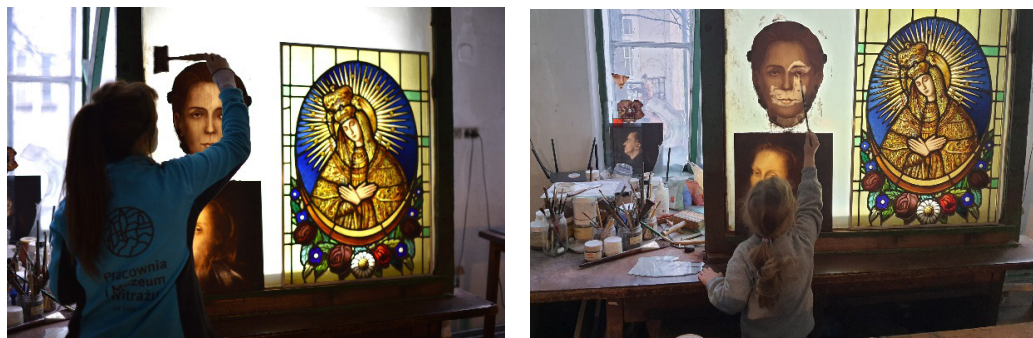
Stained glass workshops for organised groups are not only an opportunity to create beautiful works of art, but also to learn about the history and tradition of stained glass. Workshop participants will learn how stained glass is made, what the different techniques of making it are and what the most famous stained glass works in the world are. Workshops at the Stained Glass Museum are an ideal opportunity to acquire new skills (figures 7 and 8).<sup>23</sup> The workshops are based on live demonstrations conducted by qualified craftsmen who present the step-by-step process of creating stained glass. Craftsmen meticulously illustrate every step, from initial design and glass selection to precise cutting, assembly and routing of glass elements. This detailed demonstration highlights not only the technical skills required, but also the artistic vision and careful planning of each element. After the demonstrations, participants can try their hand at stained glass techniques under the supervision of craftsmen. This hands-on experience is invaluable because it allows participants to directly engage with the craft, feel the texture of glass, practice cutting techniques and assemble their creations. Throughout the process, craftsmen provide individualised feedback and support, helping participants overcome challenges and refine techniques. At the end of the workshops, participants gain in-depth knowledge of the craftsmanship involved in creating stained glass.

The museum also has its own separate stained glass gallery. When entering the museum building, we are on the ground floor next to the staircase. This is the main communication core between floors. Going up, we reach the first floor, where the museum rooms begin. If visitors go downstairs after entering the building, there is an art gallery on the floor below. It is available for free and is a separate space. Stained glass windows from various periods and styles are presented here, under the artistic direction of Piotr Ostrowski. In addition to the permanent exhibition, temporary exhibitions are organised. Works that interpret the art of stained glass in a modern and multi-threaded way are presented here. Temporary exhibitions are very diverse.

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<sup>23</sup> *Workshop and stained glass museum*, accessed December 1, 2023, <https://muzeumwitrazu.pl/en/>.

The elements presented in the gallery enter into a dialogue with space. Through the effects of light and shadow, glass elements create spatial impressions.



**Figs 7 and 8:** *Workshop space in the Stained Glass Factory in Cracow.* Photograph by author, 2023.

## Conclusion

The implementation of the living museum concept in the Cracow Stained Glass Factory stands as a compelling example of the preservation and promotion of visual and architectural heritage. By seamlessly blending traditional craftsmanship with contemporary engagement strategies, the living museum concept at the Stained Glass Factory creates a unique and immersive experience for visitors.

The Stained Glass Factory, with its roots dating back to 1902, played a pivotal role in shaping Polish visual culture and contributing to architectural heritage. Despite the decline in popularity of stained glass art in contemporary times, the living museum concept has breathed new life into the factory. By maintaining its classic form and offering a range of visitor experiences, the museum ensures the preservation of both the architectural heritage of the factory building and the visual heritage of stained glass art. Cracow Stained Glass Factory, with its living museum concept, exemplifies a dynamic approach to heritage preservation. By embracing change and adapting to modern expectations,<sup>24</sup> the factory continues to contribute to the cultural richness of the region. The living museum not only safeguards the architectural heritage of the factory building but also ensures the continuity of stained glass artistry by engaging and educating visitors. As a living organism, the museum evolves and thrives, becoming a vibrant hub that will sustain the legacy of stained glass craftsmanship for generations to come.

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<sup>24</sup> BIAO, Gao, SHUANGSHUANG, Yu. Upgrading museum experience: Insights into offline visitor perceptions through social media trends. In: *Emerging Trends in Drugs, Addictions, and Health*, vol. 4, 2023.

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# Losing Genius Loci in Cultural Heritage Sites – Landscape of Defensive Castle Open-Air Museums of the Jurassic Belt, Poland

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## *Losing Genius Loci in Cultural Heritage Sites – Landscape of Defensive Castle Open-Air Museums of the Jurassic Belt, Poland*

Cultural heritage gives places meaning and an atmosphere called genius loci based on tangible and intangible values. Nowadays, we can observe a commercial and consumerist approach to the spirit of place: it is used as a promotional tool and a tourism product, reduced to a cliché satisfying popular consumers tastes. The aim of this study is to identify the values which determine the identity of a place and the dangers they face, trying to answer the question: how can genius loci be protected? We analyse the problem based on the example of selected open-air museums at defensive castles in Poland's Jurassic Belt. These museums have become a field of commercial entertainment and fallen victim to irreversible transformations.

Keywords: genius loci, cultural heritage, tangible and intangible values, open-air museum, tourism

## Introduction

Current times are characterised by an extraordinary pace of global technological, economic and urban transformations. The effects of these transformations are felt in almost every aspect of life. High-speed communications, information exchange and the development of digital spaces have shaped new types of social relationships and altered our perception of traditional values related to space.<sup>1</sup> To illustrate this process, Manuel Castells introduced the concept of the “space of flows”, which he juxtaposed with the traditional “space of places” which are formed based on real relations with physical places full of meaning and significance.<sup>2</sup> The phenomena

<sup>1</sup> GEISLER, Robert, NIEROBA, Elżbieta. Museum transition toward market-oriented identity: Between social issues and public policy. In: *Muzeologia a kultúrne dedičstvo*, vol. 10, 2022, Is. 4, pp. 6–8, doi:10.46284/mkd.2022.10.4.1.

<sup>2</sup> CASTELLS, Manuel. European Cities, the Informational Society, and the Global Economy. In: (R. T. LeGates, F. Stout eds.). *The City Reader*. London: Routledge, 2003, pp.475–4 85.

of rapid and superficial perception, commercialisation and lack of profound reflection lead to the transformation of places into non-places.<sup>3</sup> The absence of references to traditional value systems contributes to the widespread adoption of consumerist attitudes. The rapid and superficial reception of content is a form of consumption – from the consumption of material goods to the consumption of mass entertainment and tourism.<sup>4</sup> Ease of assimilating messages is achieved through simplifying communication, resulting in the solidification of recipients' attitudes, which become programmatically geared towards perceiving manipulated images.<sup>5</sup> Tourist spaces are a particular form of mystification, often involving the staging of authenticity.<sup>6</sup>

These phenomena can be widely observed, and particularly affect Poland's cultural landscape, which is rich in historical content and sites. Numerous contemporary studies have confirmed that the intensive development of tourism transforms places into popular commercial destinations, undermining their original values, spirituality and identity.<sup>7</sup>

Therefore, in this text, we attempt to define the threats faced by places which represent cultural heritage, assess the degree of lasting degradation, and explore the possibility of reversing the transformations they undergo. Additionally, we seek answers to questions concerning the preservation of their vanishing identities.

### Purpose, scope, and methodology of the research

The scientific problem addressed in this study is how to describe and diagnose the observed issue of the disappearance of the identity and genius loci of places with high historical and landscape value due to factors ranging from general civilizational changes to the development of tourism and commercialisation of spaces. Many historically valuable places, including open-air museums, are becoming locations for commercial entertainment, as a result of which heritage sites undergo irreversible transformations.<sup>8</sup>

This study aimed to identify historical sites, landscapes and contexts that determine the significance and identity of a place and to find ways to preserve genius loci in the face of cultural, technological and social changes.

Our research questions focused on assessing the degree of loss of identity and value to society, including the genius loci, as well as the potential for halting this process:

- How can we assess the degree of loss of identity and value to society, including the genius loci?
- Can the process of identity loss be stopped amidst ongoing changes?

In order to assess the degree of loss of identity of places and the disappearance of their genius loci, a multi-stage research methodology was constructed.

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<sup>3</sup> AUGÉ, Marc. *Non-Places: An Introduction to Supermodernity*. Verso. 2011. ISBN 978-1844673117.; RELPH, Edward. *Place and Placelessness*. London: Pion Limited, 1984.

<sup>4</sup> GIDDENS, Anthony. *Modernity and Self-Identity: Self and Society in the Late Modern Age*. Stanford: Stanford University Press, 1991.

<sup>5</sup> BITUSIKOVA, Alexandra. Cultural heritage as a means of heritage tourism development. In: *Muzeológia a kultúrne dedičstvo*, vol. 9, 2021, Is.1, p. 82, doi: 10.46284/mkd.2021.9.1.5.

<sup>6</sup> MACCANNELL, Dean. *The Tourist: A New Theory of the Leisure Class*. University of California Press, 1999.

<sup>7</sup> CHRISTOU, Putra A., et al. The "genius loci" of places that experience intense tourism development. In: *Tourism Management Perspectives*, vol. 30, 2019, pp. 19–32.

<sup>8</sup> RYCHNOVÁ, Lucie, MATURKANIČ, Patrik, SLOBODOVÁ NOVÁKOVÁ, Katarína, PAVLIKOVA, Martina. Open-air Museums – the Future of the Presentation of Spiritual and Architectural Heritage. In: *Muzeológia a kultúrne dedičstvo*, vol. 10, 2022, Is. 1, pp. 7-10, doi: 10.46284/mkd.2022.10.1.1.

Theoretical analysis of the state of knowledge and selection of theoretical perspective

Construction of the research tool: a model was constructed describing the attributes associated with the genius loci of a place, in order to facilitate the evaluation of the places studied. The adopted model incorporates the attributes of tangible and intangible heritage that make up the genius loci. It is a dynamic model that can be used to map variations in context, meanings, and experiences, especially in relation to local communities. The model was used as a tool to assess the state of preservation versus transformation of the analysed sites. Thanks to the tool's structure, it was possible to assess both tangible values (author's assessment, based on document analysis, in situ research, comparative analysis) and intangible values (author's assessment, based on in situ research and interviews with the local community, etc.)

General research involved analysing all monuments and sites within the study area in order to create a typology based on the variety of conservation approaches present, and the varying degrees to which the structure and physical substance of monuments and their appearance had changed. This resulted in the identification of six typological categories (full list found in Section 4).

Detailed research: The three most prominent categories relating to state of preservation vs. transformation were selected for further detailed research. They represented three extreme approaches:

- a. reversible transformations;
- b. irreversible transformations; and
- c. untransformed (authentic) sites;

For each of the three types, representative examples were identified and evaluated using the adopted model (research tool) to assess the tangible and intangible values that make up their identity.

Discussion and final conclusions: The results obtained from the assessment formed the basis for the final conclusions regarding the totality of the characteristics that build the genius loci of places. An attempt was made to assess the state of preservation of each site's genius loci and the possibilities for its protection.

## Theoretical research perspective and definition of concepts

In order to construct a theoretical model that could serve as a starting point for the research, we began by defining fundamental concepts central to our considerations: place, identity and genius loci. A comprehensive review of existing research in this area allowed us to formulate the desired definitions.

Many authors addressing the concept of place emphasise that it goes beyond mere physical location.<sup>9</sup> The notion of place dates back to ancient philosophy, but its contemporary development has undergone significant change since the 1960s.<sup>10</sup>

<sup>9</sup> LEE, Vernon. *Genius Loci: Notes on Places* (1899). In: *Travel essays*. [S.l.]: Createspace Independent Publishing Platform, 2017.

<sup>10</sup> A synthetic overview of the development of place theory can be found in the works of various authors: CRESSWELL, Tim. *Place, a short introduction*. Oxford: Blackwell Publishing, 2005; ŻMUDZIŃSKA-NOWAK, Magdalena. *Miejsce – tożsamość i zmiana*. Gliwice: Wydawnictwo Politechniki Śląskiej, 2010; LEWICKA, Maria. *Psychologia miejsca*. Warszawa: Wydawnictwo Naukowe Scholar, 2012; SARYUSZ-WOLSKA, Magdalena, TRABA, Robert. *Modi Memorandi – leksykon kultury pamięci*. Warszawa: Wydawnictwo Naukowe Scholar, 2014; BEVILACQUA, Francesco. *Genius loci. Il dio dei luoghi perduti. Copertina flessibile*. [S.l.]: Rubbettino Editore, 2009.

The definition adopted in this study is built upon classic theories, including David Canter's, which posits three components of a place: a) physical attributes, b) human activities and c) concepts, understood as mental and emotional relations between people and the place.<sup>11</sup> Another significant concept for us is the humanistic definition of place initiated by Y.F. Tuan, who emphasises that a place is formed through experience and the attribution of values and meanings to space.<sup>12</sup> Similarly, Edward Relph describes the relationship between a person and a place as consisting of individual, profound and often subconscious experiences,<sup>13</sup> while Robert Sack adds a further perspective of the physical aspects of place.<sup>14</sup> In this study, we based our definition on a synthesis of these views: "Place is a world of spatial and humanistic values, with humanistic values being crucial for the emergence, existence and development of a place".<sup>15</sup>

One of the fundamental values that make up a place is its identity. The identity of the place is the core that integrates all of its characteristics and values, both spatial and humanistic. These accumulate over time through people's experiences of the place and the construction of collective memory. Identity determines the authenticity and uniqueness of a place.

A related concept, though more challenging to define, is the term *genius loci*, the spirit of a place. This concept dates back to ancient times, where it referred to the protective spirit of a place. A wide review of the history of this concept can be found in the work of many researchers.<sup>16</sup> It appears as a local value or local memory,<sup>17</sup> as a polyphony of voices and a mosaic of relations – a palimpsest of overlapping elements.<sup>18</sup> Christian Norberg-Schulz builds the concept of *genius loci*, presenting it as the sum of all physical and symbolic values and meanings in a natural and human-made environment, perceived, experienced and understood by people, thus representing the outcome of the natural and cultural landscape.<sup>19</sup>

A crucial definition for our considerations comes from Zbigniew Myczkowski, who states that "Identity is the 'deepest' dependence that occurs between the landscape perceived by a person (environment) with its historically layered elements: content (culture, tradition of the place) and form (the canon of the place)." The author introduces the notion of the spirit of the time (*Zeitgeist*) as a distinguishing factor of identity in a given era, thereby distinguishing between "old" and "new" identity, with the latter responding to contemporary changes while originating from the roots of the former identity, serving as its creative continuation.<sup>20</sup>

Therefore, when constructing the theoretical model adopted in further analyses, we assumed the existence of relationships between the physical and humanistic values of a place, its identity and the *genius loci* in the context of human activities and experiences, as well as changes

<sup>11</sup> CANTER, David. *Psychology of Place*. New York: St. Martin's Press, 1977.

<sup>12</sup> TUAN, Yi-Fu. *Topophilia: A Study of Environmental Perception, Attitudes, and Values*. Columbia University Press, 1990; TUAN, Yi-Fu. *Space and Place: The Perspective of Experience*. University of Minnesota Press, 1977.

<sup>13</sup> RELPH, Place..., pp. 34–55.

<sup>14</sup> SACK, Robert D. The Power of Place and Space. In: *The Geographical Review*, vol. 83, 1993, p. 328.

<sup>15</sup> ŻMUDZIŃSKA-NOWAK. Miejsce - tożsamość... p.83.

<sup>16</sup> For example, ČEPAITENĖ, Rasa. *Genius Loci as a "nameless value" of natural and built heritage*. In: SZMYGIN, B. (ed.). *How to assess built heritage? Assumptions, methodologies, examples of heritage assessment systems*, Florence–Lublin: International Scientific Committee for Theory and Philosophy of Conservation and Restoration ICOMOS, 2015, pp.75–96.

<sup>17</sup> SARYUSZ-WOLSKA, TRABA, *Modi Memorandi ...* p. 24.

<sup>18</sup> COPIK, Ilona. *Genius loci jako figura antropologiczna – transformacje znaczeniowe, konteksty interpretacyjne*. In: *Transformacje. Pismo interdyscyplinarne*, vol. 76-77, 2013, No. 1–2, pp. 92–109.

<sup>19</sup> NORBERG-SCHULZ, Christian. *Genius Loci – Towards a Phenomenology of Architecture*, New York: Rizzoli, 1979.

<sup>20</sup> MYCZKOWSKI, Zbigniew. *Tożsamość miejsca w krajobrazie*. In: *Fenomen Genius Loci - Tożsamość miejsca w kontekście historycznym i współczesnym*. Warszawa, 2009, pp. 154–167.

occurring over time. The theoretical model is shown in Figure 1.

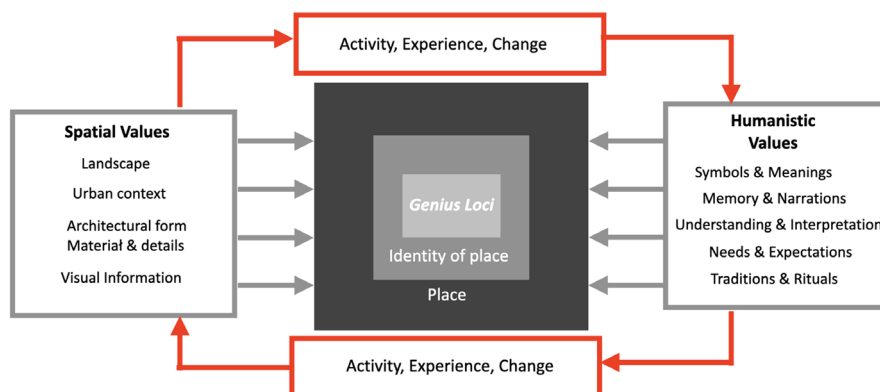


Fig. 1: Author's model of relationships between the values of a place.

### General analysis of the selected research area

The next stage of the research involved verifying the adopted theoretical model through on-site investigations. In search of suitable examples for the study, we established two co-existing criteria for the selected sites:

They must constitute a collection of monuments with similar characteristics (spatial, semantic, landscape-related).

They should represent extreme diversity in terms of their state of preservation, degree of transformation, and utilisation for tourism and commercial purposes.

Field analyses allowed us to identify a cluster of medieval castles within the Kraków–Częstochowa Upland in southern Poland as a group of sites that met the established criteria and thus were representative of the phenomenon under study. The research scope therefore encompasses defensive constructions in the Jurassic region, which constitutes a unique example of an invaluable natural and cultural landscape. Currently, this region is undergoing perilous transfor-



Fig. 2: Location and regionalisation of the Kraków–Częstochowa Upland (source: Kondracki 1988, elaboration: B. Fojcik).



mations due to the development of commercial tourism, private construction investments, and uncontrolled efforts to renovate and adapt individual historic sites.

In terms of physical geography, the Kraków–Częstochowa Upland, also known as the Kraków–Częstochowa Jura, is situated within the belt of Polish uplands. It constitutes a distinct macrogeographical region, covering a narrow band approximately 10–12 km wide and about 100 km long, from Kraków to Częstochowa (Figure 2).

The Kraków–Częstochowa Upland is one of the most captivating natural and cultural regions in Poland and, indeed, Europe. Its uniqueness and exceptional character result from the harmonious interweaving of natural environmental with material manifestations of human activity.<sup>21</sup> A wide variety of historic sites and objects can be found in this area, including churches, chapels, statues of saints, wayside crosses, strongholds, watchtowers, manors, palaces, hydrological systems and industrial facilities. In addition, there are significant manifestations of intangible spiritual and symbolic culture encompassing various customs, rituals and pilgrimages to places of special veneration.

The landscape of this area is not merely a sum of individual elements differentiated based on their characteristics. The concept of landscape is rooted in human activities, which are contingent on circumstances determined by both natural and cultural conditions, and subject to change over time. The relationship between humans and the geographical and cultural environment is an ongoing process that evolves over historical periods. The totality of these values and relations forms the unique identity of places and their genius loci.<sup>22</sup>

The exceptional natural beauty and simplicity of the culture have made the Kraków–Częstochowa Uplands an area that is intensively visited by tourists. This area offers a variety of attractions that appeal to various types of tourism, including cognitive and recreational tourism, as well as specialised interests such as landscape enthusiasts. The touristic infrastructure generally complements the spatial structure of the region in a harmonious way. However, the influx of mass culture poses a threat to this harmony. The appropriation of landscapes for settlement purposes under the pretext of “recreation” has become widespread, resulting in areas falling victim to construction and development activities. These landscapes have become symbols of a consumeristic era, where the genius loci gives way to “spiritual deserts” – loci communes.<sup>23</sup>

The research method used in this article is based on an interdisciplinary approach, combining elements of historical, architectural, urban planning and cultural geography studies. To assess the degree of identity loss and the value of genius loci in the selected medieval defensive monuments in Poland’s Jurassic region, in-depth field research was conducted. The first stage involved creating an inventory, which involved conducting a detailed survey of the objects, their history, architecture and the changes they have undergone over time. Subsequently, an iconographic analysis was carried out using available iconographic and photographic sources documenting the appearance of these sites at different points in time. This analysis facilitated the reconstruction of their original form and allowed us to identify the transformations they had undergone.

<sup>21</sup> BOGDANOWSKI, Janusz. Dawna linia obronna Jury Krakowsko-Częstochowskiej. Problemy konserwacji i adaptacji dla turystyki. In: *Ochrona Zabytków*, vol. XVII, 1964, No. 4, pp.3–36.

<sup>22</sup> MYCZKOWSKI, Zbigniew. Kompozycyjne i architektoniczne wyznaczniki tożsamości krajobrazów. In: *Problemy Ekologii Krajobrazu*. Tom XL, 2015, pp.199 – 208.

<sup>23</sup> REMBOWSKA, Krystyna. *Kultura w tradycji i we współczesnych nurtach badań geograficznych*. Łódź: Wydawnictwo Uniwersytetu Łódzkiego. 2002.

As part of the research, planning documents, legal regulations and heritage protection regulations at the local and regional levels were analysed. This enabled identification of potential legal gaps and ambiguities regarding the protection of historical sites and opportunities for improvement.



**Fig. 3:** Location of investigated sites in the Kraków–Częstochowa Upland (own elaboration).

The castles in the Kraków–Częstochowa Upland (Figure 3) were mainly built in the Middle Ages, predominantly in the fourteenth century, although some date back to an earlier period. Most of them were associated with the defensive activities of King Kazimierz the Great of Poland, but there were also bishops' fortresses and private structures belonging to knightly families. In the Early Modern period, new castles ceased to be constructed but existing fortifications were expanded and adapted to changing military, residential and economic needs. In the seventeenth and eighteenth centuries, the castles in the Jurassic region gradually fell into ruin. It is worth highlighting that numerous defensive building construction projects undertaken by King Kazimierz the Great contributed to the increasing military significance of the Kraków–Częstochowa Upland, which served as the border between the Kingdom of Poland and the Silesian duchies in the fourteenth century.

Castles built in the Middle Ages were expanded in subsequent centuries to strengthen their defences and provide better living conditions. It is worth noting that the expansion mainly affected private castles, which served as residences for influential families. Some of these castles reached impressive sizes, reflecting the power and artistic taste of their owners. In the sixteenth century, bastions replaced towers in front of defensive walls. This period also saw the most significant transformations in castles owned by influential families in Małopolska, such as Ogrodzieniec (number 10 in Figure 3), Tenczyn (23) and Pieskowa Skala (18). They were

rebuilt as grand Renaissance residences. The Gothic castle of Ogrodzieniec was transformed into an immense Renaissance residence in the first half of the sixteenth century by its then-owner Jan Boner.<sup>24</sup> The castle in Bobolice (7) was probably expanded in the fifteenth and again in the sixteenth century by the Myszkowski and Męciński families.<sup>25</sup>

Similar spatial developments occurred at the castle in Olsztyn (1), which was given to the most deserving families of the Kingdom from the late fourteenth century onwards. It was expanded in the mid-fifteenth century and later in the sixteenth century by subsequent starostas (mayors), Mikołaj Szydłowiecki and Piotr Opaliński.<sup>26</sup> In the second half of the sixteenth century, the castles on the Jura were still of significant military importance. Some of them played a role in battles against the forces of Archduke Maximilian Habsburg, who claimed the Polish crown after the death of Stefan Batory in 1587. The castle in Olsztyn managed to withstand enemy attacks, while the army of Maximilian captured Ogrodzieniec Castle and probably also destroyed the fortress in Bobolice.<sup>27</sup>

Most of the castles on the Kraków–Częstochowa Upland destroyed during the so-called “Swedish Wars” – the wars between Poland and Sweden from the second half of the sixteenth century to the beginning of the eighteenth century – were abandoned in the seventeenth or eighteenth century, including Olsztyn, Bobolice and Ogrodzieniec castles.<sup>28</sup>

Conscious and scientifically based conservation and restoration of historical monuments in Polish lands dates back to the late eighteenth century and is related to the birth of interest in antiquity and historicism. The romantic and patriotic trends that prevailed in nineteenth-century Poland also played a significant role. The special role of castles as material carriers of national values was particularly crucial in the face of Poland’s loss of independence due to the partitions for a period of 123 years, from 1795 to 1918.

On the other hand, the prevailing “cult of ruins” and picturesque views in eighteenth- and nineteenth-century Europe, along with admiration for partially preserved architectural monuments integrated into the natural landscape, meant that the castles in the discussed area were not adequately protected from destruction and even underwent partial dismantling. On the other hand, this appreciation for ruins saved them from complete degradation and allowed them to survive precisely in the form of ruins.<sup>29</sup>

Until World War II, most of the Jurassic strongholds did not experience conservation care, leading to continuous deterioration in their condition. However, it should be acknowledged that in the nineteenth and beginning of the twentieth century, some individual conservation and restoration activities were undertaken for certain castles. However, more systematic efforts were initiated only after 1945, thanks to the initiative of the Polish Ministry of Culture and Art, as seen in the case of Pieskowa Skala and Będzin castles (18, 15). Protective measures were taken to preserve many other historical sites by the conservation authorities in Kraków and Katowice. In the following two decades, the number of conservation interventions decreased but important initiatives were still taken, such as comprehensive protective actions for Lipowiec (24) and Ogrodzieniec (10) castles, which were already secured as permanent ruins. Some

<sup>24</sup> HOLCEROWA, Teresa, HOLCER, Zygmunt. *Zamek w Ogrodzieńcu. Dane historyczne opracowane na podstawie materiałów źródłowych (okres do początków XVII w.)*. Kraków: WUOZ Katowice, n. III/2415a, 1974, p. 3.

<sup>25</sup> GUERQUIN, Bohdan. *Zamki w Polsce*. ed. 1, Warszawa: Arkady. 1974.

<sup>26</sup> KAJZER, Leszek, KOŁODZIEJSKI, Stanisław, SALM, Jan. *Leksykon zamków w Polsce*. Warszawa: Arkady. 2012.

<sup>27</sup> Ibidem.

<sup>28</sup> Ibidem.

<sup>29</sup> GUERQUIN, Zamki..., pp. 12–25.

objects received thorough restoration combined with partial reconstruction, while others were secured as permanent ruins or underwent temporary, often insufficient, conservation efforts. Despite quite a few conservation interventions, many historic sites are still threatened by ongoing destruction. Furthermore, not all actions taken on the castles and ruins can be positively evaluated.

In later years, especially after 1989, which marked the political transformation from communism to democracy in Poland, a drastic decline in conservation interventions was observed, leading to a significant deterioration of many historical monuments. Only recently has this negative trend been overcome. State funds and grants from the European Union have been obtained to carry out essential conservation works, including those in Bydlin (14), Smolenie (13), Rabsztyn (17) and Tenczyn (23). On the other hand, a completely new threat to the ruins has emerged: many objects have fallen into the hands of private owners whose “reconstruction” activities are often carried out without regard for the historical value and architectural form of the buildings. Their commercially driven initiatives are detrimental to the authenticity and integrity of historical objects, as well as to the identity of these places and their *genius loci*.

As a result of the analyses, a systematic classification of the examined objects was achieved based on the time and type of works carried out (conservation, restoration, reconstruction) and their scope (comprehensive, partial, permanent, one-time, etc.). Therefore, due to the complex nature of the conservation of Jurassic strongholds, they can be divided into several groups:

1. Castles restored after World War II – Pieskowa Skala (18), Będzin (15).
2. Castles secured in the form of permanent ruins – Ogrodzieniec (10), Lipowiec (24), Ojców (19).
3. Strongholds subjected to ad hoc conservation efforts (maintenance, stabilisation and potential educational presentation of ruins) – Olsztyn (1), Ryczów (25), Suliszowice (2), Przewodiszowice (4), Morsko (8), Mirow (6), Sławków (16), Smoleniec (13), Bydlin (14), Pilica (11).
4. Castles undergoing conservation with elements of reconstruction – Siewierz (9), Tenczyn (23), Rabsztyn (17).
5. Castles “rebuilt” around the turn of the twenty-first century – Korzkiew (20), Bobolice (7).
6. Monuments without conservation protection – Biały Kościół (21), Ostrężnik (3), Udórz (12), Łutowiec (5).

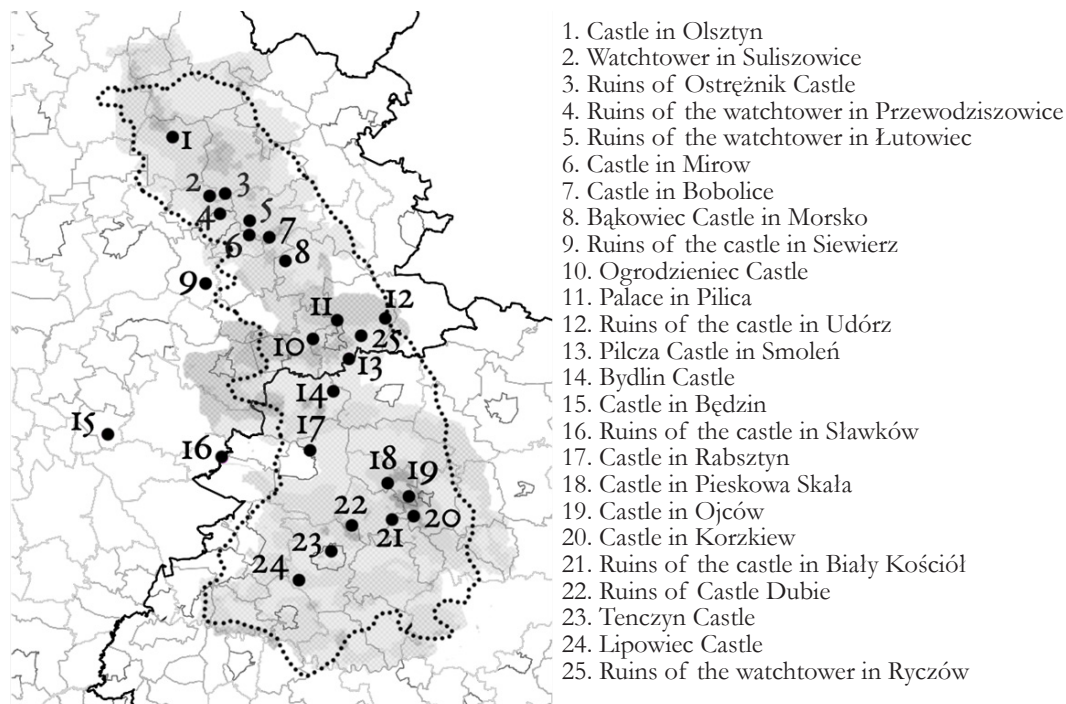
Finally, three main groups of sites were distinguished, taking into account the degree and reversibility of the transformations they underwent:

1. Sites where the changes are irreversible. These include places that have become commercial entertainment venues and have fallen victim to transformations that are difficult or impossible to reverse. Their identity and *genius loci* have been lost and the alterations raise serious doubts about whether their authenticity and historical significance can be preserved.
2. Sites which have undergone reversible changes. These include places where there is potential to restore their original identity through appropriate conservation and

revitalisation efforts.

3. Sites where the spirit of the place has not yet been compromised. These are places that have maintained their identity and authenticity, without experiencing irreversible changes thus far.

The delineated groups form key categories for further detailed research.



### In-depth analysis – case studies

From within the previously established divisions into three types of site, the most representative monuments were selected to exemplify the relative nature of each set.

Representing the first group, which includes sites with irreversible changes, are the castles in Korzkiew and Bobolice.

Korzkiew Castle (20) has been undergoing reconstruction by private investors since 1997. Unfortunately, this restoration led to the loss of its historical value as instead of preserving the authentic but poorly preserved ruins. Modern structures were introduced which bear little resemblance to the historical character of the buildings.

However, the most representative example for the first group is the castle in Bobolice (7) (Figure 5); the concept behind its reconstruction can be considered even more controversial than that of Korzkiew Castle. Bobolice Castle was destroyed by the Swedes and later abandoned, turning into ruins by the late eighteenth century. The lack of iconography depicting the castle before its destruction made it difficult to precisely reconstruct its form. Two watercolours from the mid-nineteenth century, made during the inventory of monuments in the Kingdom of Poland, unambiguously attest to the scale of the castle's destruction, and its condition has worsened since then. In 1960, limited conservation work was carried out at the castle, aiming to stop the erosion of walls, especially in the most weakened areas. Local repainting of



**Fig. 4:** *View of Bobolice Castle from the north. Watercolour by T. Chrzyński, c. 1844–1846. According to Kazimierz Stronczyński, descriptions and views of monuments in the Kingdom of Poland (1844–1855). Source: Atlas 1: Gubernia Radomska, Warsaw 2010 (elaboration: K. Guttemejer)*



**Fig. 5:** *View of Bobolice Castle from the west, photo by the authors, 2022.*

foundations and crowns of the walls was carried out, and gaps and cracks were filled. In 1990, Marcei Antoniewicz created a historical documentation of the castle, and in subsequent years, photogrammetric documentation of the ruins was conducted. However, full-scale conservation works were not undertaken until the time of the controversial “reconstruction” in the first decade of the twenty-first century.

Due to the lack of iconographic sources, the reconstruction process relied solely on the results of archaeological and architectural research from the early twenty-first century and on the description contained in the castle inventory from 1700, which, of course, was not a comprehensive or detailed registration of the building’s appearance. The project aimed to reconstruct the upper castle with the appearance of the seventeenth century and partially rebuild the remaining parts of the complex. Among the rebuilt elements, one can mention the gate building, identified during archaeological research, the shape of which can be considered a product of the designer’s imagination. Also, the southern part of the middle castle received entirely arbitrary designs. Only the silhouette of the upper castle could be more accurately reproduced, as its fragments were relatively better preserved. However, even there, hypothetical forms were added to the upper parts along with roofing, and the wooden bay window introduced in the northwest wall must be regarded as the result of the designer’s fantasy. The new monument was built in reinforced concrete construction, clad with limestone. This structure is based on preserved relics that have previously been subjected to conservation. Other significant works included the raising of large sections of defensive walls and the addition of battlements to their crowns.

Generally speaking, it is hard not to agree with Pawel Dettloff’s diagnosis that Bobolice Castle in its current state is an “architectural forgery” that misleads visitors, evokes dissatisfaction and protests from genuine connoisseurs and enthusiasts of historical monuments, and lacks the

features and values that the unforgettable ruins once possessed, and which can now only be admired through archival photographs and graphics.

These “rebuilt” castles have lost their historical and heritage value, becoming inauthentic objects. In both cases, investors launched a widespread propaganda campaign to present themselves as patrons of culture working for the preservation of national heritage. Numerous examples of such presentation can be found in traditional and electronic media. For instance, in Bobolice, a picture of the current owner is displayed on the information board, placed alongside the castle’s benefactors, placing them on the same level as King Casimir the Great. All of this demonstrates a specific and very dangerous trend, wherein ruins are reconstructed for the investors’ prestige and business purposes. The example of Bobolice also reveals the risk of turning ruins into specific tourist attractions, where the pursuit of optimal use of the object for commercial purposes takes precedence over the preservation of its scientific, educational and emotional values.

Furthermore, due to the investor’s plans to divide the surrounding areas of the castle into building plots for sale, the natural landscape surrounding the object is also at risk. The planned investments and the owner’s arbitrary construction activities have led to irreversible changes in the character of the region and the loss of the place’s exceptional atmosphere.

The second group of objects comprises those where the changes are reversible. An example of such a site is Ogradzieniec Castle (10), which underwent significant reconstruction and conservation work, resulting in the preservation of a substantial portion of the castle. The castle was built near a wooden–earth fortress on Mount Birów which was still in use in the first half of the fourteenth century. Although there is no direct historical evidence that the castle was built by King Casimir the Great, it is highly probable.

In 1949, provisional works were carried out on the ruins of Ogradzieniec Castle involving the clearance of debris and reinforcement of the most damaged sections of the walls.

In the early 1960s, a project was developed to secure the castle, which included cleaning the ruins, filling in the gaps and reinforcing the weakest parts of the walls.<sup>30</sup> Conservation work in the form of a permanent ruin, combined with thorough research, was conducted between 1964 and 1973.<sup>31</sup> The first stage of the work involved cleaning, followed by conservation of the walls with minor restorations, including “soft” restoration of the crowns. The new remortarings were separated from the existing joints by zinc sheet strips, visible up close. Where structural reinforcement of the walls was required, supports made of flat stone with varying weft were used.<sup>32</sup> The actions taken at the ruins of Ogradzieniec Castle were in line with the principles of the so-called English School of heritage conservation, which emphasises minimal intervention, the use of traditional materials and techniques, and the importance of maintaining the historical and aesthetic integrity of the structure or artifact. With regard to the conservation of ruins, this approach advocates conserving ruins in the state in which they have survived, without embellishments or new additions. According to the Venice Charter, such actions fall within the

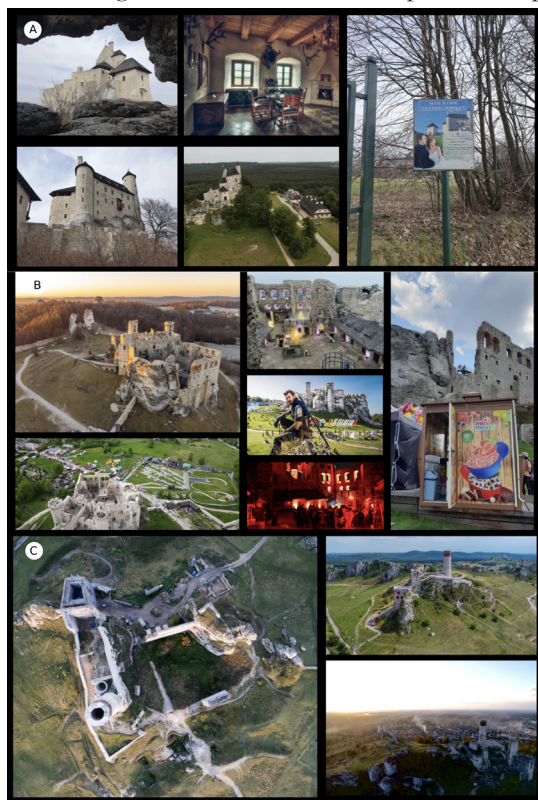
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<sup>30</sup> KAMIŃSKI, Krzysztof. *Rozpoznanie stanu technicznego i projekt zabezpieczenia ruin zamku w Ogradzieniu*. Kraków: WUOZ Katowice, nr inw. II/780b. 1961.

<sup>31</sup> GRUSZECKI, Andrzej. *Sprawozdanie z uzupełniających badań terenowych architektoniczno-historycznych przeprowadzonych na zamku w Ogradzieniu we wrześniu 1966 r.* WUOZ Katowice, nr inw. II/784a. 1966.

<sup>32</sup> GRUSZECKI, Andrzej. *Zamek w Ogradzieniu. Badania architektoniczno-historyczne*. Część I. Sprawozdanie za rok 1971, b.m. b.d., maszynopis, WUOZ Katowice, nr inw. III/2163a; Idem, *Rozwarstwienie chronologiczne zamku w Ogradzieniu*, Warszawa. WUOZ Katowice, nr inw. III/2407b.1973.

scope of restoration rather than reconstruction.<sup>33</sup> It is worth noting that within the English School, significant attention is also paid to adapting ruins for tourism purposes.



**Fig. 6:** Aerial views of castles in A – Bobolice, B – Podzamcze and C – Olsztyn (general pictures: photos by the authors, special event picture in Ogrodzieniec: [www.ogrodzieniec.pl](http://www.ogrodzieniec.pl)).

Unfortunately, despite the very good condition of the monument itself, which serves as an example of a well-functioning open-air museum,<sup>34</sup> the area below the castle is an example of significant oversaturation with “tourist products”. The castle’s offerings include food stalls, souvenir stands, and an overwhelming number of attractions for children, such as a toboggan run, a miniature park, a tunnel of fear, and much more, all within a small area leading to the castle (Figure 6). However, this aggressive commercial offer, despite the impression of chaos and cluttering of the surroundings, does not constitute a permanent transformation and can be relatively easily removed.

The third group of monuments includes those that are currently not at risk of losing their identity, although threats may arise. One example of this category is Olsztyn Castle (1), which still retains traces of its original architectural elements and carries an atmosphere of authenticity. The castle is one of the oldest monuments in the Kraków–Częstochowa Upland and was built in the second half of the thirteenth century. Originally, it was a guard post surrounded by ramparts and moats, with a dominant cylindrical stone tower.

It is difficult to determine, on the basis of indirect historical sources, who initiated the construction of the fortress. There are many indications that around the turn of the fourteenth century, it was under the control of Bishop Jan Muskaty, and that after 1306, the castle was taken over by Duke Władysław Łokietek.<sup>35</sup> In the mid-fourteenth century, the castle was expanded by King Casimir the Great.<sup>36</sup>

In the early 1950s, conservation work was carried out on the remains of Olsztyn Castle, mainly focusing on reinforcing the walls of the artillery tower.<sup>37</sup> The work primarily focused on

<sup>33</sup> TAJCHMAN, Jan. Konserwacja ruin historycznych. Uwagi o metodzie. In: *Ochrona Zabytków*, n. 4, 2005, pp. 27–45.

<sup>34</sup> KOŠTIALOVÁ, Katarína. The specific museum presentation forms of cultural heritage in rural areas, based on the example of the Hont ecomuseum and educational public footpath. In: *Muzeologia a kultúrne dedičstvo*, vol. 10, 2022, Is. 2, pp. 6–8, doi: 10.46284/mkd.2022.10.2.1.

<sup>35</sup> HOLCER, Zygmunt. Zamek Olsztyn pod Częstochową – zarys historii [Olsztyn Castle near Częstochowa - an outline of its history]. In: *Zróżnicowanie i przemiany środowiska przyrodniczo-kulturowego Wyżyny Krakowsko-Częstochowskiej*, t. 2: *Kultura*, Ojców: J. Partyka, 2004, pp.75–77.

<sup>36</sup> KAJZER, KOŁODZIEJSKI, SÁLM, *Leksykon...*, p. .23.

<sup>37</sup> BOGDANOWSKI, *Dawna linia ...*, pp. 3–36.



maintaining the building's existing condition, often by strengthening and restoring the crown of the walls, filling gaps with new building material, repairing cracks and establishing a rainwater drainage system. Although the site is currently not at risk, there is a need for appropriate measures to ensure its protection and preservation of the genius loci in the face of changing social and tourism conditions (Figure 6).

## Discussion of results and final conclusions

The research we conducted indicates that in recent decades the majority of castles and ruins in the Kraków–Częstochowa Upland have been subjected to various conservation efforts, with varying degrees of advancement. Unfortunately, some historical sites have not even received basic protective measures, leading to rapid deterioration of their remains, while others have undergone irreversible transformations for commercial purposes. The entire area is a destination for mass tourism, which visibly affects both the sites themselves and the cultural landscape in which they are situated, leading to the loss of identity, ambiance and genius loci.

Based on the findings, an attempt has been made to assess the values that historical sites currently manifest from the perspective of criteria adopted in the initial research model, namely, the spatial and humanistic aspects that constitute the identity of places (summarised in Table 1). Taking into account the process of historical sites' transformation toward supporting commercialisation and the development of mass tourism, we seek answers to the research questions posed at the beginning: 1) How can we assess the degree of identity loss and its value, including genius loci, and 2) can the process of identity loss of places be stopped in the face of ongoing changes?

**Table 1:** *Criteria for assessing the value of historic places* (own elaboration).

	<b>Spatial value</b>	<b>Humanistic value</b>	<b>Attractiveness to tourists</b>	<b>Commercial value</b>
Urban scale (landscape-oriented)	Site morphology, natural surroundings, exposure of the site/complex. Local/vernacular development context.	Indicator of local and supra-local identity sense of familiarity, tradition of place. Aesthetic and semantic value.	Environmental, recreational and cognitive values, accessibility.	Market value of land, development potential of tourism and investment facilities.
Architectural scale (object-oriented)	Authenticity of structure and substance integrity of the premises.	Educational, emotional value authenticity of the message atmosphere of the place.	Cognitive and aesthetic attractiveness. Spatial and communication accessibility, presence of accompanying services.	Promotional potential, place branding, continued strengthening of market attractiveness.

The proposed evaluation involves assessing the spatial value of places in terms of the surrounding landscape, object exposure, the value of the natural environment, and the context of local development, as well as the extent of potential destruction and threats. From an architectural perspective, we suggest assessing the integrity and authenticity of the site's heritage

substance, its state of preservation, the adopted conservation approach, and the degree of potential transformations and threats. Regarding its significance values, the site and its context are assessed in terms of their importance as carriers of visual and historical information.

The humanistic values of places can be considered in relation to their connections with local culture and history. It is also worth examining whether objects play a role as identity markers within local and broader communities.

Simultaneously, by applying the adopted research model, changes in the values of places as a result of their commercialisation and development for mass tourism should be analysed. Valorisation from a tourism perspective is a highly complex issue, starting from the complexity of defining tourism, tourist movements, the tourism market, and the tourism potential of places and objects.<sup>38</sup> A strong focus on satisfying tourists' needs and providing experiences is a precondition for effective competitiveness, which aligns tourism offerings with commercial activities.<sup>39</sup> Analysis of reports from tourism development organisations (i.e. from within the tourism industry) clearly indicates that the “place brand” plays a significant role in the process of building and promoting a comprehensive, certified tourism product, adeptly utilising elements related to the authentic value of the place, with the ultimate goal of selling the product.<sup>40</sup>

Given the complexity of the issue of valuing places for tourism attractiveness, for the purposes of this study, we propose analysing them based on the following two criteria:

1. Evaluation of aesthetic and cognitive value, i.e., state of the natural environment, scenic exposure, informational and educational values, etc.
2. Evaluation of utility value: accessibility, accommodation, restaurants, etc.

As a result of detailed analyses and observations of phenomena related to the commercialisation of spaces, not only in the context of tourism development but also in terms of spatial transformations, the following concerning phenomena were noticed:

- On an urban scale: the market value of investment areas adjacent to historical sites is higher, leading to uncontrolled investor development in areas that should be designated as protected zones. The dynamic growth of accompanying infrastructure, such as transportation, hotels, and restaurants, results in a high degree of spatial interference and visual intrusion into the landscape.
- On an architectural scale: noticeable and permanent transformations of historical objects lead to the loss of authenticity in their substance and structure, resulting in the distortion of their symbolic significance and the erosion of their historical credibility.

<sup>38</sup> DUDA-SEIFERT, Magdalena. Kryteria oceny atrakcyjności turystycznej obiektów architektury w świetle literatury. In: *Turystyka Kulturowa*, No. 4, 2015, pp.74–87; NITKIEWICZ-JANKOWSKA, Anna. Potencjał turystyczny a możliwości kształtowania produktów turystycznych w regionie. In: *Geographia. Studia et Dissertationes*, T. 33, 2011, pp. 101–154.

<sup>39</sup> FEDYK, Wojciech, CIEPLIK, Justyna, SMOLARSKI, Tomasz, GRUSZKA, Izabela. Atrakcyjność turystyczna i komercjalizacja obiektów turystycznych. In: *Rozprawy Naukowe Akademii Wychowania Fizycznego we Wrocławiu*, No. 46, 2014, pp. 3–15.

<sup>40</sup> *Sprawozdanie z działalności Polskiej Organizacji Turystycznej w 2021 roku* [Report on the Activities of the Polish Tourist Organization in 2021]. Polska Organizacja Turystyczna.

The final result of the conducted analyses is a proposal for a tool that can be used to evaluate historical sites in the context of changes and potential threats. Table 2 contains the proposed assessment criteria for spatial, humanistic, touristic, and commercial values.

The second research question was: can the process of identity loss of places be stopped in the face of ongoing changes? The research revealed that the spatial and humanistic values of places are assets which attract tourist and commercial activities, but they also make important heritage sites vulnerable to such activities. Preserving identity in the face of transformation is contingent upon the continuity of development and the preservation of the site's unique characteristics. On the other hand, cultural disconnection, commercialisation and commodification often lead to irreversible loss of form, significance, identity and, consequently, the most ephemeral value: the genius loci. These findings are corroborated by numerous studies which emphasise that commercial tourism can destroy places and their specific character, transforming cultural iconic centres into mass entertainment venues.<sup>41</sup>

**Table 2:** Summary of interview insights on perceptions and impact of ruins in the Jurassic Belt, Poland

Group of respondents	Main aspects of conversations	Impact on local identity	Challenges/ recommendations
Local residents	Preservation of historical significance of the ruins – Concerns about conservation state	Ruins as symbols of local history and identity – Strong emotional responses	Maintaining the integrity of the sites – Avoiding excessive changes
Tourists	Aesthetic and educational experiences – Need for better informational materials	Deepening knowledge of local history – Increased interest in the region	Better signage and information – Organising guided tours
Site managers	Challenges related to maintenance – Balancing accessibility with conservation	Structural safeguarding for future generations	Modern interventions minimising impact on historical sites – Sustainable tourism practices
Site employees	Daily maintenance challenges – Visitors' reactions to changes	Working towards cultural heritage preservation	Strengthening conservation efforts – Educating visitors
Heritage conservation Experts	Conservation methods – Balancing restoration with authenticity preservation	Impact on long-term heritage protection	Minimising interventions on original structure – Promoting sustainable conservation

As part of our research, we also conducted comprehensive interviews with local communities to gather insights into their perceptions of the castles and the changes that have occurred to them. These conversations were held with a diverse range of groups, including local residents, tourists, site managers, employees working at the sites and experts specialising in the conservation of historical monuments. The questions focused on general changes to the

<sup>41</sup> CHRISTOU, et al. The “genius loci” ..., pp. 19–32.; SOLSKA, Małgorzata. Duch miejsca, a współczesna przestrzeń życia człowieka. In: *Fenomen Genius Loci - Tożsamość miejsca w kontekście historycznym i współczesnym*, Warszawa, 2009, pp. 69–82.

structures and how these changes are perceived by visitors, as well as the impact on the local community.

Local residents often reflected on the historical significance of the ruins and expressed concerns about the preservation of these sites amidst modern developments. They emphasised the importance of maintaining the integrity of the ruins to preserve local history and identity. Tourists provided valuable feedback on their experiences and the aesthetic and educational value of the ruins, highlighting both the enchanting and deteriorating aspects of the structures. They frequently mentioned the need for better informational materials and guided tours to enhance their understanding and appreciation of the sites.

Site managers and employees shared practical insights into the challenges of maintaining these sites and the efforts made to balance conservation with access. They noted that while modern interventions are necessary for safety and usability, these changes sometimes clash with the historical ambiance of the sites. Experts in historical monument conservation discussed the delicate balance between restoration and preservation, advocating for methods that minimise alterations to the original structures.

One of the most frequently mentioned aspects across all groups was the impact of increased tourism on the ruins and the surrounding areas. While tourism brings economic benefits, it also poses risks to the structural integrity and authenticity of such sites. Many interviewees highlighted the need for sustainable tourism practices to ensure that the influx of visitors does not compromise the essence of these historical landmarks.

The ongoing changes to the ruins have a profound impact on local identity. For many residents, the castles are a symbol of their cultural heritage and a tangible link to the past. Alterations to these sites can evoke strong emotional responses, as they affect not only the physical landscape but also the collective memory and sense of place within the community. Ensuring that these changes are carried out thoughtfully and respectfully is crucial in maintaining the cultural continuity and identity of the local population.

This multi-faceted approach allowed us to capture a broad spectrum of opinions and experiences, offering a holistic view of the cultural and social dynamics surrounding the defensive castle open-air museums of the Jurassic Belt in Poland. The gathered data underscores the importance of these historical sites not only as places of cultural heritage but also as active elements which influence contemporary community identity as well as the local tourism economy.

By analysing the spatial and humanistic values of the places in contrast to the criteria which guide commercial and touristic approaches, it was possible not only to assess the degree of degradation of the identity of these places but also to describe the causes of this process. The main reasons for negative transformations are neglect of legal protections and aggressive, uncontrolled commercial activities, of which tourism is one, although it is not the sole factor. Historical places are all too often reduced to banality and pseudohistorical narratives to cater to average tastes and needs. These dangerous actions lead to the destruction of historical spaces and a diminished awareness among those who visit them. However, the most perilous actions are those that result in permanent and irreversible transformations of historical objects and the surrounding landscape through uncontrolled interventions by commercial investors. Therefore, it is essential to take action to recognise culturally valuable areas and implement tools for their genuine protection, as well as to build public awareness of their vanishing qualities.

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# Intangible Cultural Heritage: Social Memory and the Axiology of Protection

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## *Intangible Cultural Heritage: Social Memory and the Axiology of Protection*

Traditional culture and values are the axiological foundation of states. Folk culture and folklore can be considered the cornerstone of national heritage. This article analyses the actions taken by UNESCO which contributed to the crystallisation of a multilateral international agreement that, for the first time in history, covered the conservation of intangible cultural heritage. The article's main research hypothesis is the statement that cultural heritage is an axiological mirror of civilisation, as well as the basis for the existence and development of society. This is connected with a more detailed thesis that the intangible manifestations of culture are the source of living heritage of humanity and carriers of values. Since cultural heritage encompasses manifestations of various cultures' activities and creativity, the comparative method was also used. The research findings show that supporting cultural diversity plays an important role in building interpersonal solidarity in the spirit of dialogue, mutual trust and cooperation. Respect for intangible cultural heritage is a guarantee of peace and security internally and from an international perspective.

Keywords: intangible cultural heritage, international law, cultural diversity, "living" books, ethics of protection

## Introduction

Cultural heritage reflects the manifestations of human creativity and invention. Heritage is a reservoir of values through which social identity and memory can be nurtured. In heritage, axiological processes are constantly taking place that connect the past with the present. Cultural heritage carries human existence beyond the ontological and physical dimensions by referring to immutable, universal values. In the literature published so far, attention is mainly focused on the description of material heritage. However, the cultural codes of heritage would have no impact without "living" social tissue. Material artefacts such as monumental architectural structures, literary works that provoke reflection, or subtle objects such as works of art arouse admiration and respect for the artistry of the human mind. Artistic creation and contact with art imbue existence with a deeper dimension. This article will discuss the process of shaping intangible heritage conservation on an international level. The arguments will be supported by pointing to strategic programs introduced by UNESCO, which highlight the role and importance of intangible heritage conservation as the symbolic genetic code of humanity.



## The world of culture and the values of cultural heritage

Culture creates the basis for social roots. The life of each individual takes place in a specific socio-cultural environment. Culture has both a material aspect (e.g. letters, book collections, maps) and an intangible aspect (e.g. beliefs, legends passed down from generation to generation, local ceremonies, ethnomedicine). The values that give meaning to human existence constitute the core of culture. Hence, it can be stated that culture includes symbolic features of the way of life of a specific nation or ethnicity.<sup>1</sup> In sociological terms, “culture” focuses on the social processes that lead to the externalisation of a given idea or concept. As Anthony Giddens points out, culture plays “an important role in consolidating the values and norms of a given society, but on the other hand, it creates significant opportunities for creativity”.<sup>2</sup> Social life is dynamic, which means that there are constant interactions in the sphere of culture. As a result, new patterns of creation and perception of the surrounding reality are formed. Culture expands, but also fills human activity with new content, for example, subcultures related to given professions, urban subcultures or ecological movements. Each social group uses a code of communication derived from the symbolic sphere. The objectification of human cognition in the form of a tangible work is a characteristic feature of the sphere of culture. In this approach, “the idea is the primary subject of the work which has been created”.<sup>3</sup> This often leads to culture being perceived through the prism of material monuments and objects of contemporary art.

It should be noted, that the concept of “inheritance” stands for heritage passed down from our ancestors. Cultural heritage therefore goes beyond physical objects. As Jan Pruszyński emphasises:

monuments and cultural heritage are not synonymous.... Monuments can theoretically be perceived in isolation from history, creating abstract and academic constructions of artistic trends, styles, schools or masters’ workshops – cultural heritage cannot be considered in isolation from history, because as a phenomenon it provides evidence in the process of history. Heritage is an attitude to the past not only in its material dimension (...). Spiritual culture shapes the personality, material culture only sustains it.<sup>4</sup>

Cultural heritage is thus closely linked to spiritual values and universally accepted norms, which play an essential role in ensuring social development in the spirit of peaceful coexistence and dialogue. Kamil Zeidler underlines that “the moral and legal duty of the present generations is to pass on the cultural heritage of previous generations to future generations in the best possible condition”<sup>5</sup>. Lack of respect for monuments that are part of cultural heritage

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<sup>1</sup> BALDWIN, Elaine, LONGHURST, Brian, McCracken, Scott, OGBORN, Miles, SMITH, Greg. *Wstęp do kulturoznawstwa*. Poznań: Wydawnictwo “Zysk i S-ka”, 2007, p. 24.

<sup>2</sup> GIDDENS, Anthony. *Sojologia*. Warszawa: Wydawnictwo Naukowe PWN, 2008, p. 48.

<sup>3</sup> DASZKIEWICZ, Wojciech. Podstawowe rozumienie kultury - ujęcie filozoficzne. In: *Roczniki Kulturoznawcze*, 1, 2010, 58.

<sup>4</sup> PRUSZYŃSKI, Jan. *Dziedzictwo kultury Polski - jego straty i ochrona prawna*, t. I. Kraków: Kantor Wydawniczy “Zakamycze”, 2001, pp. 42–43, 44–45, 48.

<sup>5</sup> ZEIDLER, Kamil. Ochrona dziedzictwa kultury a turystyka, czyli w poszukiwaniu “złotego środka”. In: *Folia Turistica*, 20, 2009, 158.

results in the breaking of the “chain that allows it to endure”.<sup>6</sup> The weakening or breaking of intergenerational ties can result in the erosion of culture and deprive the individual of a sense of participation in culture. Katarína Košťalová and Ivan Murin argue that cultural phenomena are transmitted in connection with the past or revitalised in the present.<sup>7</sup> This process should proceed with respect for the axiological determinants of human personality. As Ladislav Lenovský points out, the terms “cultural values”, “cultural resources” and “cultural potential” are synonymous.<sup>8</sup> Cultural management supports the process of influencing cultural potential through the multiplication of cultural assets. It should be noted that the genesis of cultural phenomena is rooted in the immaterial sphere. Intangible heritage creates an axiological matrix for the impulse that precedes the materialisation of cultural phenomena and goods in the literal dimension. Therefore, the description of intangible heritage as the “mother of all cultures”<sup>9</sup> may be considered accurate. However, before the paradigm of the protection of intangible heritage is discussed, it is necessary to outline the issue of the link between heritage and national culture in more detail.

### Sources of national identity

Throughout history, each individual and each social group has been expressed through culture. In the mirror of time, one can see the values that construct identity. Culture allows one to define oneself, draw inspiration from the past, and develop according to individual capacity based on an internal value system. Cultivating heritage is an essential factor in preserving culture with its unique regional features.<sup>10</sup> It should be borne in mind that cultural identity and cultural diversity are not mutually exclusive. Admittedly, they are separate building blocks in the axiological core of a given social group, but together they form an image of humanity composed of all the nations of the world. Cultural community requires respect for the equality, sovereignty and dignity of every human being. The development of identity cannot take place through attempts to unify, exercise cultural hegemony or impose stereotypical cultural models. In the light of the above, the message of the UNESCO Mexico City Declaration – that all cultural policy should restore the human dimension to the idea of development – remains valid to this day.<sup>11</sup> The axiology of intangible cultural heritage is a condition for the functioning of a nation based on the social and spiritual dimension of human existence. Culture is the basis for morally engaged development.

<sup>6</sup> DOBRZYN, Anna. *Międzynarodowy przepływ dzieł sztuki. Między reglamentacją a liberalizacją*, quoted for: ZEIDLER, Kamil. *Wartości zabytku jako kategoria normatywna*. In: SZAFRAŃSKI, Wojciech (ed.). *Wokół problematyki prawnej zabytków i dzieł sztuki*, t. II. Poznań: Wydawnictwo Poznańskie, 2008, p. 47.

<sup>7</sup> KOŠTIALOVÁ, Katarína, MURIN, Ivan. Changes in Intangible Cultural Heritage in Slovakia. The Case the Fuja-ra. In: *Traditiones*, 50(1), 2021, 151.

<sup>8</sup> LENOVSKÝ, Ladislav. Cultural Heritage as a Part of Cultural Potential (in the Context of Revitalization of Ethnic Minorities). In: *Studia Etnologiczne i Antropologiczne*, 19, 2019, 79.

<sup>9</sup> ITO, Nobuo. *Intangible Cultural Heritage involved in Tangible Cultural Heritage*. In: *14th ICOMOS General Assembly and International Symposium: “Place, Memory, Meaning: Preserving Intangible Values in Monuments and Sites”*, 27–31 October 2003, Victoria Falls, Zimbabwe.

<sup>10</sup> *Resilienz von Living Heritage: Mit Immateriellem Kulturerbe nachhaltig in die Zukunft*. In: BAUER, Marie-Theres, BIASETTO, Cristina (eds.). *Immaterielles Kulturerbe in Österreich. Eintragungen 2020–2021*. Österreichische UNESCO-Kommission, p. 14.

<sup>11</sup> Mexico City Declaration on Cultural Policies, World Conference on Cultural Policies, UNESCO, Mexico City, 26 July – 6 August 1982, pt. 15.

Traditional culture is at the core of the formation of national heritage. Folklore permeates the history and culture of nations. By definition, “folklore” is defined as the collective creation of a cultural community based on tradition.<sup>12</sup> Traditional culture, adopting various forms of folkloric expression, shapes the social identity of individuals and groups. As a result, folklore creates a “living” culture that makes up the spiritual structure of a given community. Folklore can, therefore, be considered a carrier of identity and community. Following this course of reasoning, traditional culture encompasses professed values, adopted ways of life, and the religious and symbolic spheres. Among the manifestations of folk art are the written word (literary folklore), traditional rituals, folk costumes, handicrafts and culinary products. Many manifestations of folk art function only in oral lore. The ephemeral nature of oral folklore makes it particularly vulnerable to loss.

It bears highlighting that folklore culture is not static but evolves with the transformations of social life. Modern media and communication technologies are increasingly entering everyday life. For many folk artists, new technologies create an opportunity to reach a larger audience. With the help of digitisation, it is possible to preserve and perpetuate cultural messages in digital form. Currently, we observe the shaping of e-folklore, which, using virtual media, changes its reach from the local to the global expanse of the Internet. Digital cultural institutions, blogs and groups on social networks are bringing together artists, art enthusiasts and folklorists. It should be emphasised that content on the Internet can be freely modified at any time and posted in many variants. The constant processing of information in the virtual space is a challenge for the conservation of cultural heritage. Faced with rapid technological development and the expansion of the phenomenon of globalisation, which unifies concepts, models and behaviours, there is an urgent need to protect that which constitutes the symbolic DNA code of humanity.

In contrast to the variability of media coverage and the expendability of corpus mechanicum, the warp of intangible heritage is aimed at ensuring the harmonious development of society based on a stable axiological foundation. The UNESCO Recommendation on the Safeguarding of Traditional Culture and Folklore indicates that folklore is a means of uniting people and confirming their identity.<sup>13</sup> There is no doubt that without protecting its traditional culture, society cannot function and develop, just like a tree perishes without healthy roots and hydration. The values that make up the cells and tissues of a “living” culture constitute the “root system” for humanity. Mass culture, on the other hand, effaces the individual mark of the creator, their sense of aestheticism and artistry. In works of folk art, apart from the material dimension, the author’s personality, sensitivity and way of perceiving reality are externalised.

In light of UNESCO’s Recommendation of 15 November 1989, folklore should be protected by social groups whose identity is defined by it, as well as by scientific centres and cultural institutions. Member States should support folklore research, coordinate the development of legal instruments and implement educational activities, including pilot projects both on the regional and nation-wide level. The document emphasises the role of keeping

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<sup>12</sup> *Guidelines for the Establishment of Living Human Treasures System*, UNESCO Section of Intangible Heritage, Korean National Commission for UNESCO, Paris-Seoul 2002, p. 5. See: PARK, Seong-Yong. *The Conceptual Evolution of Cultural Heritage and ICH*. In: *On Intangible Heritage Safeguarding Governance: An Asia-Pacific Context*. Newcastle upon Tyne: Cambridge Scholars Publishing, 2013, p. 15.

<sup>13</sup> Recommendation on the Safeguarding of Traditional Culture and Folklore, adopted in Paris on 15 November 1989. See: KITTELÄ, Seppo. Folklore as an Evidential Category. In: *Folia Linguistica*, 54(3), 2020, 698, 699; MICHA-LOPOULOS, Stelios, XUE, Melanie Meng. Folklore. In: *Quarterly Journal of Economics*, 136(4), 2021, 1993.

regional and national registers of folklore institutions, keeping record of intangible cultural heritage phenomena and objects, and creating museums with folklore departments (sections).<sup>14</sup> Considering that many forms of folkloric expression are created through a direct relationship between the creator and the recipient, it is necessary to document and carefully select instruments of protection that preserve the “spirit” of the intangible heritage. “Spoken” archives combining image and sound constitute a helpful tool in this regard. Another recommendation concerns the introduction of forms of support for folk artists, private museums and people considering studying traditional professions. Actions in this direction should be taken by national authorities and local government bodies. Many traditional cultural practices and skills are disappearing at a rapid pace, and the individuals who retain personal knowledge about them are often elderly. Intangible heritage forms the “tissue” of culture, hence one should not tarry. Witnesses of the past are like “living books” from whom one can learn, drawing on the knowledge and experience of past generations.

The Istanbul Declaration emphasised that intangible cultural heritage faces “extreme vulnerability” due to the threat of marginalisation, conflicts and growing social antagonism.<sup>15</sup> Intangible heritage allows us to read the meaning of the codes used during the realisation of the creator’s vision in the form of a literal work, such as folk music, traditional dance, or a theatrical performance or dance drama relating to folk tales. Various forms of intangible heritage are characterised by being territorially unlimited, unlike immovable tangible monuments, which are closely related to a specific spatial structure. The axiology of intangible heritage through intangible values allows for the protection of traditions even if the members of a given nation had to leave their country and live in diaspora due to armed conflicts or persecution. Intangible heritage, due to its delicate nature, should be protected both during war and in times of relative stabilisation. For this purpose, protection strategies, documentation projects, scientific research and educational programs should be implemented. The Istanbul Declaration emphasises that intangible cultural heritage, which is the source of cultural identity for nations, is an integral part of the heritage of all humanity.<sup>16</sup> This means that in order to protect intangible heritage, forward-looking actions should be implemented on a regional, national and international level.

In the 1990s, UNESCO took a number of actions to protect folk culture and folklore, which are now referred to as manifestations of intangible cultural heritage.<sup>17</sup> Among the initiatives taken, one of special note has been the designation of “Living Human Treasures”. This strategic programme was launched in 1994. The term Living Human Treasures refers to people who are the creators, administrators and bearers of specified elements of intangible cultural

<sup>14</sup> Pt. “B” and “C” of UNESCO’s Recommendation on the Safeguarding of Traditional Culture and Folklore, adopted in Paris on 15 November 1989.

<sup>15</sup> Final Communiqué - Istanbul Declaration, Third Round Table of Ministers of Culture “Intangible Cultural Heritage, Mirror of Cultural Diversity”, Istanbul, Turkey 16–17 September 2002, pt. 4. Cf. BASTET, Tatiyana, HOUL-BROOK, Ceri. Folklore: Cultural Roadmaps to Creating, Perpetuating, Resolving and Evolving Peace and Conflict. In: *Peace Review: A Journal of Social Justice*, 35, 2023, 188.

<sup>16</sup> Final Communiqué - Istanbul Declaration, Third Round Table of Ministers of Culture “Intangible Cultural Heritage, Mirror of Cultural Diversity”, Istanbul, Turkey 16–17 September 2002, pt. 1.

<sup>17</sup> CHAINOGLOU, Kalliopi. The Protection of Intangible Cultural Heritage in Armed Conflict: Dissolving the Boundaries Between the Existing Legal Regimes? In: *Santander Art and Culture Law Review*, 2(3), 2017, 110. See also GKANA, Alik. Safeguarding Shared Intangible Cultural Heritage: A “Bridge over Troubled Water”? In: *Gdańskie Studia Międzynarodowe*, 18(1–2), 2020, 176.

heritage<sup>18</sup> of high historical, cultural or artistic value.<sup>19</sup> Traditional folklore knowledge is based on vanishing and increasingly rare skills. According to UNESCO, Living Human Treasures are “persons who embody in the very highest degree the skills and techniques necessary for the production of selected aspects of the cultural life of a people and the continued existence of their material cultural heritage”.<sup>20</sup> In actions taken to preserve intangible assets, it is extremely important to implement a heritage management mechanism that takes into account the national legal tradition. Hence, depending on the country, cultural circle and geographical region, terms such as Bearer of Popular Craft Tradition (Czech Republic), Holder of an Important Intangible Cultural Property (Japan and Republic of Korea) or National Living Treasure (Republic of Korea), are used.<sup>21</sup> The Living Human Treasures program was based on concerns over the fragility and ephemerality of folk culture. The preservation of folklore is a prerequisite for the protection of national cultural identity and, in a broader sense, the creation of a “culture of peace through international cultural exchanges and co-operation”.<sup>22</sup> By cultivating folk culture, it is therefore possible to strengthen the sense of axiological continuity as a guarantor of society’s harmonious development.

### “A mirror of cultural diversity”<sup>23</sup> – intangible cultural heritage

A broader designation of intangible cultural heritage has been gradually gaining traction in international fora. In 2001, Janet Blake argued that the human context in which intangible heritage is created should be protected as much as its tangible manifestations.<sup>24</sup> Over time, the conviction began to crystallise that not only external manifestations of folklore should be protected<sup>25</sup> but also values, along with the processes that lead to the shaping of intangible cultural heritage.<sup>26</sup> Previously, the concepts of heritage protection were strongly embedded in historicism and conservation doctrine and practice.<sup>27</sup> The crystallisation of intangible heritage conservation shifted the focus to people as bearers of values and depositors of traditional knowledge and skills.

<sup>18</sup> In the document UNESCO *Guidelines for the Establishment of National “Living Human Treasures” Systems* used in this matter the term “bearers of knowledge and skills”, pt. I, 2(i).

<sup>19</sup> UNESCO *Guidelines for the Establishment of National “Living Human Treasures” Systems*, pt. I, 3(i).

<sup>20</sup> *Guidelines for the Establishment of Living Human Treasures System*, UNESCO Section of Intangible Heritage, Korean National Commission for UNESCO, Paris-Seoul 2002, p. 19. See: GAUTHIER, Antoine (ed.). *Living Human Treasures. Systems throughout the World*. Québec: Conseil québécois du patrimoine vivant, 2021, p. 6.

<sup>21</sup> UNESCO *Guidelines for the Establishment of National “Living Human Treasures” Systems*, pt. I, 2(i).

<sup>22</sup> Resolution on Establishment of a System of “Living Cultural Properties” (Living Human Treasures) [142 EX/18 and 142 EX/48], Executive Board of UNESCO at its 142nd Session in Paris on 10 December 1993, pt. 3.

<sup>23</sup> Final Communiqué - Istanbul Declaration, Third Round Table of Ministers of Culture “Intangible Cultural Heritage, Mirror of Cultural Diversity”, Istanbul, Turkey 16–17 September 2002.

<sup>24</sup> Developing a New Standard-Setting Instrument for the Safeguarding of Intangible Cultural Heritage. Elements for consideration by Janet Blake Honorary Visiting Research Fellow School of Law University of Glasgow (United Kingdom) [Revised Edition, 2002], UNESCO, Paris 2001, p. V.

<sup>25</sup> See: Action Plan for the Safeguarding of the Intangible Cultural Heritage as approved by the International Experts on the Occasion of the International Round Table on “Intangible Cultural Heritage - Working Definitions” organised by UNESCO in Piedmont, Italy, from 14 to 17 March 2001, pt. 7, 9.

<sup>26</sup> KOWALSKA, Samanta. Legal Protection of the Intangible Culture Heritage. In: *Societas et Iurisprudentia*, 2(3), 2014, pp. 79–95.

<sup>27</sup> GÜVEN ULUSOY, Özge F. Integrated Documentation of Tangible and Intangible Cultural Heritage in Urban Historical Sites. In: *The International Archives of the Photogrammetry, Remote Sensing and Spatial Information Sciences*, XLVIII -M-2-2023, 2023, 702; EICHLER, Jessika. *Intangible Cultural Heritage under Pressure? Examining Vulnerabilities in ICH Regimes - Minorities, Indigenous Peoples and Refugees*. Stuttgart: Institut für Auslandsbeziehungen, 2020, p. 14.

The first legally binding international instrument for the protection of intangible cultural heritage was signed in Paris on 17 October 2003. The UNESCO General Conference adopted the Convention for the Safeguarding of the Intangible Cultural Heritage at its 32nd session. It should be clarified that the items proclaimed as “Masterpieces of the Oral and Intangible Heritage of Humanity” before the Convention came into force were incorporated to the Representative List of the Intangible Cultural Heritage of Humanity.<sup>28</sup> The Masterpieces of the Oral and Intangible Heritage of Humanity program was introduced in 1997. The aim was to get governments and non-governmental organisations actively involved in the work of protecting oral and intangible heritage. Examples of intangible heritage of exceptional value or those threatened with extinction were to be proclaimed.<sup>29</sup> In this way, local communities were given the opportunity to cultivate and promote particularly valuable expressions of traditional culture. Masterpieces of thought and creativity make up the cultural and historical roots of a community.

The UNESCO Convention of 17 October 2003 created a legal framework for the protection of intangible heritage on an international level. Pre-existing international agreements and “soft law” acts were insufficient to fill the gap in international law. The existing resolutions and documents protected cultural and natural heritage<sup>30</sup> but an effective and efficient international legal instrument designed to protect intangible heritage was lacking. The intangible sphere touches the diverse, complex and multi-faceted dimensions of human life. The Preamble to the Convention noted that intangible heritage contributes to the development of creativity and the enrichment of cultural diversity. The Convention consists of 40 articles that form an internal and coherent whole. Article 2 contains a legal definition of the concept of “intangible cultural heritage”. Accordingly, the term intangible heritage encompasses practices, perceptions, means of transmission, knowledge and skills, as well as related instruments, objects and cultural artifacts. Language as a vehicle of cultural heritage, knowledge and practices about nature and the universe, customs, performing arts and folk crafts are all listed among the manifestations of intangible cultural heritage (Article 2, item 2). This aspect refers to elements of cultural heritage that do not have a material externalisation or physical form. Intangible heritage creates an axiological framework for the idea that precedes materialisation in phenomena and cultural assets.<sup>31</sup> Hence, intangible heritage also includes what is non-literal: memories and feelings.<sup>32</sup> Intangible heritage is transmitted intergenerationally, constantly recreated by communities and

<sup>28</sup> Article 31, item 1, the Convention for the Safeguarding of the Intangible Cultural Heritage adopted in Paris on 17 October 2003.

<sup>29</sup> *Guidelines for the Establishment of Living Human Treasures System*, UNESCO Section of Intangible Heritage, Korean National Commission for UNESCO, Paris-Seoul 2002, p. 29. See: Questionnaire (for Member States) for the Updating of the Existing “Guidelines for the Establishment of a ‘Living Human Treasures’ System” in the Member States [2002 Edition].

<sup>30</sup> Convention concerning the Protection of World Cultural and Natural Heritage, adopted by the General Conference of the United Nations Educational, Scientific and Cultural Organization at its 17th session in Paris on 16 November 1972.

<sup>31</sup> HANKE, Benjamin. *Begriffsdefinition und Dimensionen des Immateriellen Kulturerbes*. In: HANKE, Benjamin. *Kulturelle Teilhabe durch Immaterielles Kulturerbe. Instrumente der Kulturpolitik in Deutschland zur Umsetzung der UNESCO-Konvention von 2003*. Wiesbaden: Springer, 2024, p. 67.

<sup>32</sup> STEFANO, Michelle, DAVIS, Peter, CORSANE, Gerard (eds.). *Safeguarding Intangible Cultural Heritage*. Woodbridge: The Boydell Press, 2012, p. 1. See also, e.g. ZOU, Hoideiniang, PRISCILLA, Evangeline. Folklore: An Identity Born of Shared Grief. In: *Cogent Arts & Humanities*, 10(1), 2023, pp. 1–15; GAO, Yang, LI, Mengmeng, LI, Qingning, HUANG, Keji, SHEN, Shiwei. Inheritors’ Happiness and its Relevant Factors in Intangible Cultural Heritage. In: *Sustainability*, 14(21), 2022, 1–17.

social groups in relation to their environment, history and the impacts of nature (Article 2, item 1). States Parties are obliged to protect the intangible cultural heritage located on their territory with the participation of local communities and individuals who create and transmit the heritage from generation to generation (Article 11 in relation to Article 15). Awareness of the importance of intangible heritage for maintaining socio-cultural continuity should encourage the implementation of strategic protection programs.

In order to protect and promote intangible heritage and develop the spirit of cooperation in this area, UNESCO established the Representative List of the Intangible Cultural Heritage of Humanity. Phenomena and cultural goods from various nations and ethnic groups are named. The List is maintained and updated by the Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage. States Members are elected for a period of four years on the principles of equitable geographical representation, with half of the composition changing every two years.<sup>33</sup> Member States present candidates who are “qualified in the various fields of the intangible cultural heritage” (Article 6, item 7 in fine). Such candidates should combine specialist legal knowledge with verified scientific knowledge. Measures taken in this area are based on respect for human rights, social activation in the field of culture, promotion of both formal and informal cultural education, and the protection of the rights of indigenous people. An important role in this regard is played by intergenerational dialogue, building a sense of unity, tolerance and understanding between people.

The phenomenon of globalisation, progressive degradation of the cultural landscape, the rise of artificial divisions between people, natural disasters and armed conflicts make the delicate structure of intangible heritage particularly vulnerable to erosion. Anna Przyborowska-Klimczak pointed out that “preserving cultural diversity in this area [intangible heritage] is a special challenge for the international community. Awareness of the existing threats to these elements of heritage, which are quite fleeting, particularly sensitive and sometimes difficult to consolidate, should prompt states to seek appropriate legal and organizational instruments to prevent the irreversible loss of the most valuable elements of the world’s intangible heritage”<sup>34</sup>. Elements threatened with extinction can, at the request of a state party, be entered on the List of Intangible Cultural Heritage in Need of Urgent Safeguarding (Article 17, item 1).<sup>35</sup> International assistance on the basis of Convention norms may be granted for activities related to the protection of intangible heritage requiring urgent protection (Article 20, pt. “a”). A request for international assistance may be submitted to the committee by any state party in whose territory the threatened heritage elements are located. Where circumstances so require, a request may be made jointly by two or more states parties (Article 23, item 2). In cases requiring immediate action, the Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage considers requests for assistance as a matter of priority.

### Protection of intangible heritage integrated into biological tissue

Surveying and protecting intangible heritage should take into account regulations on the protection of tangible heritage, intellectual property rights and environmental norms. Indeed,

<sup>33</sup> Legal basis: Article 5, item 1 in relation to Article 6, item 1–2 and 4, the Convention for the Safeguarding of the Intangible Cultural Heritage adopted in Paris on 17 October 2003.

<sup>34</sup> PRZYBOROWSKA-KLIMCZAK, Anna. Międzynarodowa ochrona niematerialnego dziedzictwa kulturalnego. In: *Problemy Współczesnego Prawa Międzynarodowego, Europejskiego i Porównawczego*, 3, 2005, 20, 21.

<sup>35</sup> On the basis of Article 17, item 3, in cases of extreme urgency the Committee may inscribe an element of intangible cultural heritage following a consultation with a State Party.

the memory of nations lies not only in the chronicles and documents stored in archives and libraries but also in the environment in which human life takes place. When considering intangible cultural heritage, it is necessary to emphasise the importance of protecting the biological tissue in which human existence is embedded. For many people, nature is a source of creative inspiration and creative impulse. According to the holistic view of nature, all elements and processes are related and complementary to each other.

There is no doubt that holism should also be applied to artistic activity and expression, which is shaped under the influence of social interactions and biotic factors in a specific natural spaces.<sup>36</sup> An illustration of these arguments is Iran's Chovgan (Chovqan, Chowkan) tradition, which has existed for over 2,000 years. Chovgan is a traditional horse-riding game in Iran that combines storytelling with a musical spectacle.<sup>37</sup> The traditions and customs nurtured as part of Chovgan serve to maintain socio-cultural continuity. Chovgan is based on respect for ancestral heritage and natural heritage. The rider and the horse form an inseparable whole. People who care for the horses care for the animals and live in harmony with them. The emotional bond of caregivers with their animals is also very important in the traditional breeding of the white horses known as Lipizzans, important in much of Central and Eastern Europe.<sup>38</sup> Horse breeding brings whole families together. The horses are also taken care of by people associated with hippotherapy, horse riding, agriculture and stud farms. At stud farms, the caregiver's custody begins with the birth of the foal, which creates a strong bond with the animal. Each horse is also provided with the care of a qualified veterinarian. Breeding Lipizzans combines material heritage with the intangible sphere, for example, horse-inspired painting, the creation of accessories and riding costumes, traditional vocabulary. The breeding of falcons is also a carrier of identity in many cultures. Falconry is an example of a "living" heritage that has been passed down from generation to generation in various regions of the world for over 4,000 years.<sup>39</sup> Originally, people trained birds of prey to hunt for food. Over time, falconry has become an integral part of cultural heritage. Falconers have a special bond with their birds. Falcon breeding is a symbol of regional cultures in which attention is paid to maintaining harmonious relations with nature. Nowadays, falconers support the establishment of falcon breeding facilities and hospitals for birds, as well as the protection of the natural habitats of falcons. Thus, interactions and interdependencies between cultural and natural heritage are strong. Humans are dependent on the forces of nature; hence, in order to protect cultural heritage, the natural environment in which the processes that make up the systems of life on Earth take place should be taken into account. Without protection of the natural environment, it is impossible to ensure decent living conditions for people and healthy ecosystems.

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<sup>36</sup> The role of considering natural values while preserving cultural heritage objects is indicated in Article 5.1, The Burra Charter. The document was adopted by Australia ICOMOS (the Australian National Committee of ICOMOS) on 19 August 1979. The Charter was revised in 1981, 1988, 1999 and 2013.

<sup>37</sup> The Chowkan tradition was inscribed on the Representative List of the Intangible Cultural Heritage of Humanity in 2017 (Iran).

<sup>38</sup> Lipizzan horse breeding traditions were inscribed on the Representative List of the Intangible Cultural Heritage of Humanity in 2022 (Austria, Bosnia and Herzegovina, Croatia, Hungary, Italy, Romania, Slovakia, Slovenia).

<sup>39</sup> Falconry has been inscribed on the Representative List of the Intangible Cultural Heritage of Humanity in 2021 (Austria, Belgium, Croatia, Czechia, France, Germany, Hungary, Ireland, Italy, Kazakhstan, Kyrgyzstan, Mongolia, Morocco, Netherlands, Pakistan, Poland, Portugal, Qatar, Republic of Korea, Saudi Arabia, Slovakia, Spain, Syrian Arab Republic, United Arab Emirates).



## Authenticity and the importance of the vitality of cultures

Currently, protection of heritage is challenged by the phenomenon of merchandising, which leads to the transformation of cultural goods into retail products. Using social engineering methods, merchandising influences customer behaviour through the way goods are presented and arranged, the interior design of the space, and the atmosphere created by the seller. In this context we are dealing with so-called dedicated merchandising products aimed at generating profits with a relatively low production cost.<sup>40</sup> In the sphere of culture, the technique of merchandising can lead to the mass production of goods that reference the socio-historical context of a given community but are not, in fact, ephemeral cultural goods. Objects sold as souvenirs in museum gift shops which are modelled on actual exhibits and monuments serve as an example here.<sup>41</sup> Often, the industrial production of such products teeters on the border of legality, for example, when images of celebrated figures are used without the knowledge and consent of their descendants. Images of historical figures are often placed on objects unworthy of their legacy and their contribution to public life, society, science and art. Freedom of thought, expression and information does not excuse the violation of personal rights or the distortion of the cultural image of individuals and social groups. Currently, merchandising products are increasingly sold via electronic trading platforms (e-commerce platforms).

The UNESCO Convention of 20 October 2005 emphasises that cultural diversity contributes to the broadening of people's horizons, nurturing human capacities and values and forms of expression.<sup>42</sup> The distribution of cultural goods is a form of flow and exchange of ideas, stimulating culture-forming and cultural interactions between people. Culture plays an important role in the design and implementation of national development policies. With the help of cultural services, it is possible to disseminate literary and artistic creations and develop the potential of individual communities. A balanced and fair cultural exchange fosters dialogue between cultures, promotes tolerance and generates respect for the cultural heritage of individual nations which together form the cultural heritage of humanity. Hence, rationally implemented means of distributing cultural goods can provide an additional impulse for the development of cultural institutions, creators and artists, and, on a transnational scale, protect and promote the vitality of cultures. However, in undertaking action in this area, it is important to bear in mind that, as emphasised in the Convention, cultural goods are carriers of identity, meanings and values, therefore they cannot be reduced to or treated as purely commercial and mercantile objects.

## Summary

Actions taken to protect intangible cultural heritage are preceded by legal acts and recommendations for the protection of folk culture. While monuments and material objects

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<sup>40</sup> PALÙ, Doriana Dal, LERMA, Beatrice, BOZZOLA, Marco, DE GIORGI, Claudia. Merchandising as a Strategic Tool to Enhance and Spread Intangible Values of Cultural Resources. In: *Sustainability*, 10(7), 2018, 1.

<sup>41</sup> CHENG, Sida. *How Do Museums Develop a Sustainable Business Model through Retail Merchandising? A Case Study of the Palace Museum*. Leuven: KU Leuven, Faculty of Arts, 2018–2019, p. 25. Cf. ZHANG, Bolun, CHENG, Peng, DENG, Lujie, ROMAÏNOOR, Nurul Hanim, HAN, Jianhong, LUO, Guoshuai, GAO, Tianbo. Can AI-generated Art Stimulate the Sustainability of Intangible Cultural Heritage? A Quantitative Research on Cultural and Creative Products of New Year Prints generated by AI. In: *Heliyon*, 9(10), 2023, 1–15.

<sup>42</sup> Preamble, the Convention on the Protection and Promotion of the Diversity of Cultural Expressions, adopted in Paris on 20 October 2005 during the 33rd session of the General Conference of the United Nations Educational, Scientific and Cultural Organization (UNESCO).

define the socio-cultural space of human functioning, intangible heritage is rooted in the sphere of thought, emotions and spirituality. Federico Lenzerini correctly states that the culture of a nation is created by values and all those intangible elements that a given community considers to be components of its internal identity, distinguishing it from other social groups.<sup>43</sup> At the same time, the aforementioned elements make up the “very heart of [the] distinctive idiosyncrasy”<sup>44</sup> of a given nation. Despite its distinctiveness, intangible heritage makes it possible to build bridges between people. Although it is externalised in the material sphere, intangible heritage exists primarily in the spiritual one. This leads us to the conclusion that intangible heritage is not constructed by the representativeness of tangible objects such as monuments, towering buildings or large architectural complexes. A human being is the creator and bearer of intangible heritage. Preserving intangible cultural heritage therefore involves on listening to the “living books” of culture-bearers, recording and understanding their words in order to be able to pass them on. Intangible heritage consists of the collective memory of humanity, a factor in shaping and confirming the cultural identity of various individuals and social groups. As Laurajane Smith and Natsuko Akagawa argue, heritage creates and recreates a sense of social inclusion.<sup>45</sup> Hence, blurring traces of the past will lead to the exclusion and alienation of people in a world in which authenticity is increasingly displaced by triteness, pettiness and cheap fakes. Cultural heritage, on the other hand, is closely related to the identity that is shaped by intangible values. Intangible heritage represents the diversity of living heritage of humanity. A strong rootedness in heritage is therefore a guarantee of the development and continuation of a active culture in which human beings can ground their identity.

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<sup>43</sup> LENZERINI, Federico. Intangible Cultural Heritage: The Living Culture of Peoples. In: *The European Journal of International Law*, 22(1), 2011, 101.

<sup>44</sup> LENZERINI, Federico. Intangible Cultural Heritage ..., p. 102.

<sup>45</sup> SMITH, Laurajane, AKAGAWA, Natsuko (eds.). *Intangible Heritage*, London, New York: Routledge Taylor & Francis Group, 2009, p. 7.

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# An operational windmill in an open-air museum as a conservation challenge: Lessons from projects recently implemented in Poland

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## *An operational windmill in an open-air museum as a conservation challenge: Lessons from projects recently implemented in Poland*

The article discusses the methods of protecting historic windmills and recognising them as valuable objects of industrial heritage. Therefore, examples of attempts to restore windmills as working mills after 2010 are discussed. Translocation combined with comprehensive renovation can be an effective and desirable method of conservation for historic windmills with a wooden structure, as it enables the restitution of these facilities as operating mills. However, one should be aware of the risks associated with this type of activity: primarily the risk of losing the historic, original substance of the mill and changing its landscape context. An important problem is the safety of the dynamic exhibition and the lack of professionals – millers specialised in the field of drive mills, who would be able to not only set up the technological process but also maintain the machines included in it on an ongoing basis. The following part of the article discusses 12 examples of attempts to restart historic windmills. These examples are divided into two categories of objects: windmills with an alternative, modern electric drive; windmills with the ability to work using only wind power. The analysed examples of windmill conservation and reactivation provide the basis for formulating lessons for future projects in Poland and abroad.

Keywords: windmill, milling technology, reactivation, industrial heritage conservation

## Introduction

This article focuses on the issue of protection and maintenance of windmills, with particular emphasis on translocation to open-air museums and restoration to a technical condition enabling operation. The main motivation to take up the topic was that windmills were underestimated as technical monuments of rural industry. The architecture, structure and equipment of a windmill form a compact and logical whole, and the preservation of all these elements determines the integrity of the monument. For this purpose, the article discusses

and analyses the conservation activities of historic windmills in Poland undertaken by open-air museums and local governments. Due to the extensiveness of the subject, the focus is on recent (after the year 2010) implementations that have taken place in the current socio-economic reality and are therefore the most useful from the point of view of lessons for the future, which are formulated in the summary of this work.

## Historical background

Industrial heritage objects were identified as monuments relatively late, occurring only in the 1950s and 1960s.<sup>1</sup> Nevertheless, rural architecture had become an object of scientific interest much earlier, in the 1870s.<sup>2</sup> The first initiatives to protect windmills in Europe were taken in 1923 by the association of Dutch mills De Hollandsche Molen.<sup>3</sup> In 1926, the association purchased the Adriaan windmill in Haarlem. It is worth mentioning here that at the end of the 1920s, the problem of preserving windmills was noticed by Bernhard Schmid, a Prussian conservator of monuments operating in the province of West Prussia. Due to the greater efficiency of industrial mills, windmills (of which there were 62 in that province) gradually ceased to fulfil their function. However, their importance to the landscape and historical value were noticed – in Żuławy they had been present since the Middle Ages.<sup>4</sup> In 1927, the Senate of the Free City of Gdańsk protected the three most important drainage mills in Orłowo (Orloff), Orłowskie Pole (Orloffene Felde) and Ostaszewo (Schöneberg).<sup>5</sup> In Poland, the post-war inventory of windmills of historic value was made at the end of the 1950s. The records covered 867 windmills, the largest clusters of which were recorded in the then Poznań and Warsaw voivodeships.<sup>6</sup> The first entries in the register of monuments come from this period, granting “recognition as a monument.”<sup>7</sup> The first post-war windmill conservation initiatives were primarily related to the development of open-air museums. The oldest open-air museum in Poland is the Museum – Kashubian Ethnographic Park, established in Wdzydze Kiszewskie in 1906. At a similar time, the Museum of Folk Architecture – Ethnographic Park in Olsztyniek was founded, the beginnings of which date back to 1909. It was then that a decision was made in Królewiec to create a museum of rural architecture. About 20 copies of objects from the eighteenth and nineteenth centuries were erected in the Królewiec Zoo, including a copy of a windmill (paltrok mill) from Schönfließ (now Komsomolskoje in the Kaliningrad region). In the years 1938–1942, the open-air museum was moved to Olsztyniek. The Schönfließ windmill was

<sup>1</sup> WALCZAK, Bartosz M. Czy zabytki techniki i inżynierii to w Polsce wciąż dziedzictwo “drugiej kategorii”? Rys historyczny oraz aktualne problemy, [Are monuments of technology and engineering in Poland still a “second-class” heritage? Historical outline and current problems]. In: *Ochrona Dziedzictwa Kulturowego*, 2 (16), 2016, pp. 133–144 [in Polish].

<sup>2</sup> CZAJKOWSKI, Jerzy. Muzea na wolnym powietrzu w Europie [Open-air museums in Europe]. Rzeszów – Sanok: KAW, 1984, p. 6 [in Polish].

<sup>3</sup> PRARAT, Maciej, Architektura wiejska w granicach Prus Zachodnich jako przedmiot zainteresowań naukowych i konserwatorskich do lat 40. XX w. [Rural architecture in West Prussia as a matter of interest of Conservation and Monument Studies until the 1940s]. In: *Acta Universitatis Nicolai Copernici: Zabytkoznawstwo i Konserwatorstwo*, vol. XLV, 2014, pp. 185–221 [in Polish].

<sup>4</sup> Ibidem.

<sup>5</sup> Relics of the drainage windmill from Ostaszew are kept in the Żuławy Museum in Nowy Dwór Gdański.

<sup>6</sup> GDANIEC, Zygfryd. Dzień dzisiejszy wiatraków [Windmills today]. In: *Mówią Wieki*, 11, 1968 [in Polish].

<sup>7</sup> An example is the decision of the Department of Culture of the Presidium of the Provincial National Council in Łódź, No. Kl.III-52/14/57 of December 16, 1957, recognising the windmill – post mill in Solca Wielka (Ozorków commune) as a monument, and the decision No. Kl. III-52/11/60 of March 26, 1960, recognising the windmill – post mill in Dąbrowa (Zelów commune) as a monument.

restored in 2015–2016.<sup>8</sup> One of the oldest open-air museums in Poland is Skansen Kurpiowski in Nowogród. Its creation was first suggested in 1919, and the institution was opened in 1927. After World War II, the idea of an open-air museum in Poland began to develop dynamically. Museums were established in Zubrzyca Górna (1957), Sanok (1958), Toruń (1959), Opole (1960), and Chorzów (1961).<sup>9</sup> The first translocations of windmills for exhibition purposes took place in the 1960s. The windmill from Plewki can be mentioned here, which moved in the early 1960s to the open-air museum in Nowogród.<sup>10</sup> Other examples include the paltrok mill from Grzawa, translocated to Chorzów (1964, fig. 2–6), and the tower mill from Dobrocin (1962–1965, fig. 27), transferred to Olsztynek. In subsequent decades, there were further open-air museum initiatives, under which the care of windmills was taken over by museologists. By 1979, 26 windmills had been translocated to Polish open-air museums.<sup>11</sup> In 2022, according to the authors' research, the number of windmills in museum collections was 77. Of these, we can distinguish 48 post mills, 13 tower mills, 13 paltrok mills and 3 turbine windmills.

Recently, that is, after 2010, a tendency to restore windmills as working mills has become noticeable. Most of these initiatives are undertaken by museum institutions. Attempts to restart the windmills have met with various problems concerning conservation and organisation. It is worth taking a closer look at these initiatives, analysing them and drawing relevant conclusions.

The article is of a synthetic nature – it consists of an analysis of previous experiences of translocations and attempts to restore windmills as working mills undertaken by Polish open-air museums (*ex post* research). As a result of the research, conclusions of a more general nature have been formulated – a proposal of conservation principles for the reoperation of windmill mechanisms.

### Translocations and attempts to restore windmills as working mills

The very poor technical condition of many historic windmills that have survived to this day means that they often require major repairs, including the replacement of a significant number of structural elements. A comprehensive mill restoration often involves relocation, usually to an open-air museum. Such renovation requires dismantling and dismembering the entire structure of the monument, making the necessary repairs and patchwork, replacing the most degraded elements and then reassembling the translocated object into one logical whole. Unfortunately, in many cases, the scope of interference in the historic, authentic substance of the windmill is so large that the object loses the value of antiquity. The patina, which is a natural effect of the passage of time, gives way to new elements, and the way in which it is made (mainly in terms of wood processing) and appearance differ from the original. The relocation means changing the landscape context around the mill. Sometimes such a change can have a positive effect on the exposure of the windmill in the landscape. More often, unfortunately, it is the other way around. At this point it is worth recalling the example of the Dutch approach

<sup>8</sup> CHODKOWSKA, Wiesława, SABLJAK-OLEJDZKA Monika. *O miatrakach Warmii i Mazur i młynarzu z daleka...* [About the windmills of Warmia and Mazury and the miller from afar...]. Olsztynek: Muzeum Budownictwa Ludowego – Park Etnograficzny w Olsztynku, 2016, s. 133 [in Polish].

<sup>9</sup> CZAJKOWSKI, Muzea..., p. 220.

<sup>10</sup> ŚWIĘCH, Jan. Młyny wietrzne i wodne w muzeach na wolnym powietrzu w Polsce. Problemy translokacji, rekonstrukcji, demonstracji i konserwacji [Wind and water mills in open-air museums in Poland. Problems of translocation, reconstruction, demonstration and conservation]. In: *Problemy ochrony młynów jako zabytków techniki i architektury*. Radom: Muzeum Wsi Radomskiej, 2021, p. 10 [in Polish].

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



to mill conservation, as formulated in the study “A future for mills: Principles for dealing with heritage mills”. There is a very strong emphasis on the integrity of the monument, which concerns not only the mill itself but also its landscape and social context. Relocation is therefore not recommended in the Netherlands.<sup>12</sup> However, one should be aware that in Polish socio-cultural conditions, where there is a lack of sensitivity to the generally understood quality of space and protection of the cultural environment, relocating windmills is often the only way to preserve them for future generations. In addition, translocation combined with comprehensive renovation can be an effective and desirable method of conservation for historical windmills with a wooden structure, as it enables the restitution of these objects as working mills. In the case of monuments of technology, an important conservation postulate is to activate them at least periodically, which positively affects the technical condition of the mechanisms. According to Świąch, already in 1934, Maria Znamierowska-Prüfferowa argued that windmill mechanisms should be complete and ready for demonstration work and that museums should be places for cultivating old techniques and specialist knowledge passed on to the next generations of craftsmen.<sup>13</sup>

Recently, several such attempts have been made in Poland. These initiatives (apart from the in situ commissioning of the tower mill in Pyzdry and the roller windmill in Kalkowskie in Greater Poland) were related to the relocation. Sometimes, the restoration of technical efficiency concerned only certain movable elements (e.g., the possibility of turning the windmill buck on the main post).

Similar developments are also taking place in other Central European countries and regions (e.g., Transylvania).<sup>14</sup> Comparable functional and spatial solutions for windmills can also be observed along the Baltic Sea basin (Fig. 1).<sup>15</sup> Moreover, the socio-economic context of political transformation is similar for all countries of the former socialist bloc. Thus, the Polish experience may be useful for analogous initiatives in this region.



Starting mechanisms that have been frozen for years are usually problematic. Most of the windmills that work at least occasionally suffer from “man conservation,” that is, technical and organisational problems. In almost every case, conservators and museum curators face a choice: on the one hand, they want to preserve the original substance of the monument; on the other hand, they want to “revive” it as an efficient mechanism. In addition, there are issues related to the safety of the dynamic exhibition, as well as the problem of choosing the location of the windmill (in the event of its relocation) to ensure appropriate

**Fig. 1:** A post windmill in the Estonian Open-Air Museum, photo by B. M. Walczak, 2020.

<sup>12</sup> BAZELMANS, JOS, VAN HOF, Jan, NIENHUIS, Geert, TROOST, Gerard, and PFEIFFER, Wouter (2012). *A Future for Mills: Principles for dealing with heritage mills*, Amsterdam: RCE Cultural Heritage Agency 2012.

<sup>13</sup> ŚWIECH, Jan. Ochrona młynarstwa wiejskiego w polskich muzeach na wolnym powietrzu [Protecting rural milling in Polish open-air museums. Assumptions and implementation]. In: A. Przybyła-Dunin, B. Grabny, P. Roszak-Kwiatk (eds). *Młynarstwo tradycyjne – wczoraj, dziś, jutro... Problemy zachowania ginącego dziedzictwa*. Chorzów 2017, p. 141 [in Polish].

<sup>14</sup> BITAY, Enikő, MÁRTON, László, TALPAS, János, The story of a re-operating windmill, In: *Műszaki Tudományok Közlemények*, vol. 14, 2021, pp. 10–17.

<sup>15</sup> HORN, Kirsti (ed.), *Windmills in Estonia, Finland and Sweden*, Enja Publishing, Vantaa 2015.

wind conditions and preserve the landscape values of the monument.

The profession of a miller required special predispositions: physical fitness, endurance, good hearing, and general technical skills.<sup>16</sup> A journeyman candidate had to be able to recognise the quality of the grain, know how to clean it, operate mill mechanisms, make repairs and sharpen millstones.<sup>17</sup> Today, due to the interruption of the generational continuity of the profession and very large changes in milling technology (including changes in the method of drive transmission and transport of products within the mill), the profession of a miller in its traditional meaning is a disappearing profession. A windmill seems to be a fairly simple mechanism, but anyone who wants to keep such an object in motion must admit that it is not easy at all. A working windmill is a “living organism” – wooden gears work, dry out or swell, looseness appears here and there, transmission belts fall off the wheels, gear teeth wear out and bearing shells require regular lubrication. Millstone set-ups are also unreliable: it is sometimes difficult to maintain an equal distance between their working planes. All this means that today (as in the past) the windmill requires constant care, which is associated with costs and organisational effort. Nowadays, a very important issue is who performs the translocation and renovation of the windmill and how it is undertaken. While carpentry work is not a major problem, the maintenance and adjustment of internal mechanisms are. It needs to be clearly articulated: working internal mechanisms require specialist knowledge and experience. Therefore, without cooperating with specialists (milling technologists), carpenters will not be able to cope with the complex and multithreaded task of commissioning a historic windmill.

### Case studies of commissioning historic windmills in Poland

The selected examples of restoring windmills as working mills presented in the following part of the article are based primarily on the authors' own experiences and on the accounts of museum employees. Taking into account the number of windmills in open-air museums in Poland alone, the selected examples probably do not exhaust the issues that require further research. The group of windmills that have been restored to full or partial technical efficiency (or for which at least such an attempt has been made) includes:

- a windmill – paltrok (rebuilt from a post mill) from Grzawa in the Upper-Silesian Ethnographic Park Museum in Chorzów;
- a windmill – post mill from Wierzbica in the Radom Village Museum in Radom;
- a windmill – post mill from Zalesie in the Mazovian Countryside Museum in Sierpc;
- a windmill – post mill from Markowa in the Croft Museum of Markowa Village;
- a windmill – post mill from Zawada in the open-air museum Łęczycza Croft in Kwiatkówka near Łęczycza;
- a windmill – post mill from Dębno in the Kielce Village Museum in Tokarnia;
- a windmill – post mill from Zaduszniki in the Kujawsko-Dobrzyński Ethnographic Park in Klóbka;
- a windmill – post mill from Wojtówka in the Maria Znamierowska-Prüfferowa Ethnographic Museum in Toruń;
- a windmill – post mill from Wodziany in the Museum of Folk Architecture –

<sup>16</sup> ŚWIECH, Jan. *Wiatraki. Młynarstwo wietrzne na Kujawach* [Windmills. Wind milling in Kujawy], Włocławek 2001, p. 140 [in Polish].

<sup>17</sup> WESOŁOWSKA, Henryka. *Młynarstwo wiejskie Opolszczyzny od XVIII do XX wieku* [Rural milling of the Opole region from the eighteenth to the twentieth centuries], Opole: Instytut Śląski w Opolu, 1969, s. 168 [in Polish].

Ethnographic Park in Olsztynek;

- a windmill – paltrok from Ruska Wieś in the Museum of Folk Architecture – Ethnographic Park in Olsztynek;
- a windmill – smock mill from Dobrocin in the Museum of Folk Architecture – Ethnographic Park in Olsztynek;
- a windmill – post mill from Czacz in the Museum of Milling and Water Equipment of Rural Industry in Jaracz.

Windmills from the above list will be discussed later in the article. All the above-mentioned objects have been translocated. There are, however, other windmills worth mentioning: the wooden tower mill from Brusy in the Kashubian Ethnographic Park in Wdzydze Kiszewskie (which has technological equipment so well preserved that it could be put back into operation without any major problems), the windmill – post mill from Niemyje Nowe in the Agricultural Museum in Ciechanowiec and a fully functional windmill – post mill from Wroniawa in the Museum of Folk Architecture of Western Greater Poland in Wolsztyn.<sup>18</sup> It is also worth mentioning here other technically efficient windmills not in museum exhibitions:

- a windmill – paltrok in Kalkowskie, the community of Sośnie in the Greater Poland Voivodeship, which was restored in situ and brought back to a usable condition in 2004;
- a windmill – paltrok in Mokry Dwór, the community of Pruszcz Gdański in the Pomeranian Voivodeship, which was translocated from Wyszogród in 2016–2019;
- a windmill – post mill in the Millers Croft in Uniejów in the Łódź Voivodeship, which was translocated from Zbylczyce in 2000–2012;
- a smock mill in the Olandia holiday and conference centre in Prusim, the community of Kwilcz in the Greater Poland Voivodeship, which was translocated from Niegocin in 2012;
- a windmill – post mill in the Olandia holiday and conference centre in Prusim, the community of Kwilcz in the Greater Poland Voivodeship, which was translocated from Krzywosądów in 2022;
- a windmill – post mill in Leszno in the Greater Poland Voivodeship, which was translocated in 2018 within the city (it now stands at the intersection of Osiecka and ks. J. Popieluszko streets);
- a tower mill in Pызdry in the Greater Poland Voivodeship was restored in situ in 2019.

### Windmills with an alternative, modern electric drive

#### *A windmill from Grzawa in the Upper-Silesian Ethnographic Park Museum in Chorzów*

An excellent example of a working windmill is the object translocated in 1964 from Grzawa, currently exhibited in the Upper-Silesian Ethnographic Park Museum (Fig. 2–6). The mill was renovated and relaunched in 2014. It is a paltrok rebuilt from a post mill. It is an atypical windmill and is the only object of this type exhibited in an open-air museum in Poland. The mill dates back to the first half of the nineteenth century. The mill was in operation until

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<sup>18</sup> It is the second oldest windmill in Poland. The date 1603 is preserved on the crown tree, the date 1733 on the main post trestle brace, the date 1744 on the head wheel. This mill was translocated to the museum in the late 1990s.

around 1918.<sup>19</sup> Due to the topography of the area, the windmill currently has limited ability to work with the help of wind power. The equipment of the windmill includes: a windshaft with a head wheel, a quant with a stone nut cooperating with the wheel; a brake system; a millstones set-up; a crane for lifting millstones, a beam for runner-stone level regulation and a flour bin with sleeve bolter for flour dressing. The flour bin and the sleeve bolter are not original – they were reconstructed according to the design from 1964.<sup>20</sup> Inside the building, there is an electric motor (4 kW) with a gear motor driving the windshaft and technological devices (millstones set-up and sleeve bolter mechanism). The motor was placed by the rear (tail) wall of the windmill above the windshaft (Fig. 5, 6). The gear motor is connected through a double chain with the windshaft stub (from the rear, leeward side). A toothed wheel connected by a chain to the wheel on the output shaft of the gear motor was mounted on the shaft stub. The installation of the engine was preceded by the preparation of design documentation and calculations. The calculations showed that the effective power of the windmill sails (the power transferred by the wind motor to the power receiver) is only 1.98 kW at a torque of 11.93 Nm. On this basis, the power of the electric motor was assumed.

The solution used in the windmill from Grzawa is simple and almost failure free. However, the electric motor power turned out to be insufficient – with the help of the engine, the windshaft rotated very slowly, at a rate of two revolutions per minute, but only if the millstones set-up worked without crushing the grain.<sup>21</sup> However, in good weather – that is, sufficiently strong wind – the windmill could work without the support of an electric motor and effectively grind grain.<sup>22</sup> Currently (2023) windmill operation demonstrations have been temporarily suspended due to the following problems:

- deflection of one pair of sails at the point of attachment in the windshaft canister; there is a risk of breaking the sails due to the small cross-section of stocks – load-bearing beams embedded in the windshaft canister (it is necessary to replace and strengthen the stocks with steel elements);
- improper centring of the windshaft;
- wearing off of the windshaft wooden bearing in the breast wall; the shaft is not fixed at the right angle (approx. three degrees) – it is arranged almost horizontally, which causes the risk of the sails catching on the breast wall (it is necessary to use a stone bearing and properly seat the shaft head on it);
- delamination of the upper part of the post slab (on which the body of the mill rotates), caused by the uneven distribution of loads between the crowtree and the ceiling of the

<sup>19</sup> *Protokół z ostatecznego zakwalifikowania zabytkowego obiektu: obiekt: wiatrak / młyn wietrzny/, wieś Grzawa, powiat Pszczyzna* [Protocol on the final qualification of the historic object], May 11, 1962; CIECHANOWICZ, K., WOŁYNIAK, J. *Opis obiektu zakwalifikowanego do skansenu śląskiego* [Description of the object qualified to the Silesian open-air museum], Gliwice August 28, 1962. Source: archive of the Upper Silesian Ethnographic Park, inventory number 547 [in Polish].

<sup>20</sup> RZECZUŁA, Z., SZUNKE, S., MOSZUMAŃSKI, B. *Projekt rekonstrukcji wiatraka z m. Grzawa* [Reconstruction project of the windmill from Grzawa], Kraków: Przedsiębiorstwo Państwowe Pracownie Konserwacji Zabytków, 1964. Source: archive of the Upper Silesian Ethnographic Park, inventory number 566 [in Polish].

<sup>21</sup> ROSZAK-KWIATEK, Paweł. *Opinia etnograficzna i doradztwo techniczne w zakresie weryfikacji dokumentacji projektowo-kosztorysowej wiatraka z Zalesia ze zbiorów Muzeum Wsi Mazowieckiej w Sierpcu* [Ethnographic opinion and technical advice on the verification of the design and cost documentation of the windmill from Zalesie from the collection of the Museum of the Mazovian Village in Sierpc], Bytom 2019, pp. 5–6 [in Polish].

<sup>22</sup> According to Paweł Roszak-Kwiatek, an employee of the Museum specialising in rural industry.

first floor equipped with trolleys (it is necessary to relieve the crowntree by using pads under the “rail” on which the trolleys roll);

- incorrect execution of the so-called brake lift, making it difficult to lift the brake lever, the so-called press (proper execution of the lift is required).



**Fig. 2:** The windmill from Grzawa in the Upper-Silesian Ethnographic Park Museum; photo by F. Tomaszewski, August 2022.



**Fig. 3:** The exhibition inside the windmill from Grzawa in the Upper-Silesian Ethnographic Park Museum; photo by P. Roszak-Kwiatek, August 2016.

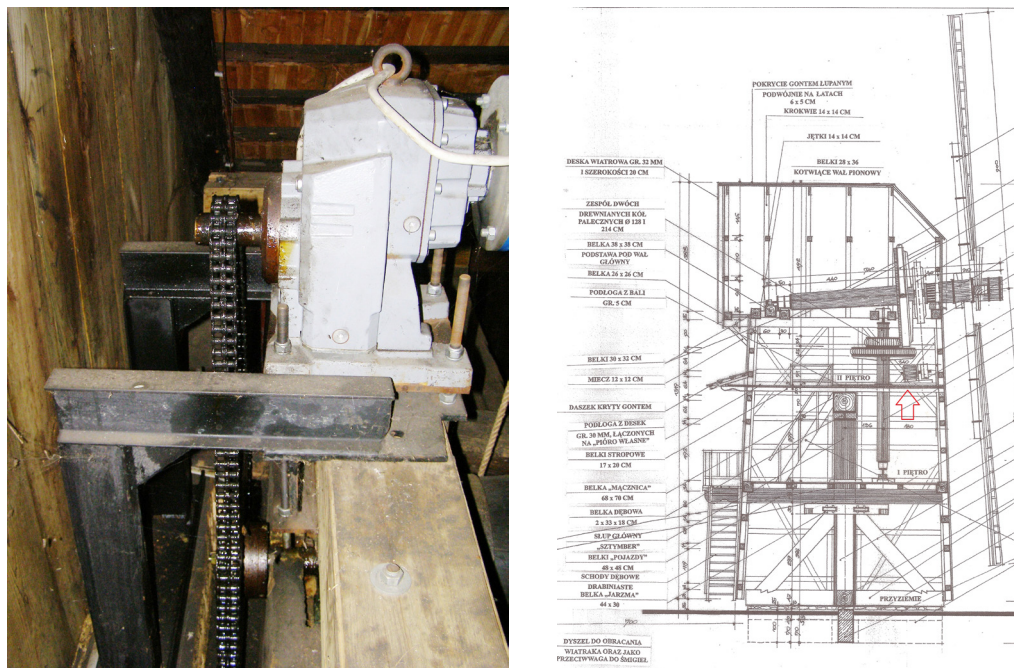


#### *A windmill from Wierzbica in the Radom Village Museum in Radom*

In November 2017 to June 2018, the post mill was translocated within the Radom Village Museum in Radom (Fig. 7–11). This windmill, dating back to 1896, was moved to the museum from Wierzbica in 1986. For many years, it served as a museum café.<sup>23</sup> The windmill in its previous location in the open-air museum was oriented with its sails towards the east, and its exposure from the north was interrupted by single-family houses. As it was impossible to set the sails in the direction of the wind, the object was therefore moved south for a distance of approximately 400 m to the croft sector.

**Fig. 4:** Windmill from Grzawa at work; source: Upper-Silesian Ethnographic Park Museum.

<sup>23</sup> *Zakończono prace przy Wiatraku z Wierzbicy* [Works on the Windmill from Wierzbica have been completed], accessed October 5, 2018, <http://www.muzeum-radom.pl/muzeum-wsi-radomskiej/efrr/zakonczono-prace-przy-wiatraku-z-wierzbicy/2282> [in Polish].



**Fig. 5–6:** An electric motor with a gear motor in a windmill from *Grzawa*; photo by F. Tomaszewski, August 2022.

The purpose of the renovation and relocation was to enable the demonstration work of the mill. The windmill has a very unusual drive transmission system from the head wheel, similar to those used in tower mills: the head wheel works with an upright shaft<sup>24</sup> that passes through the second and third storeys, located between the crowntree and the breast wall (on the windward side, where the sails are located). This shaft drives two millstone set-ups via wooden gears (Fig. 9), one of which serves as a grinding mill, while the other is used for the production of flour, cooperating with the sleeve bolter. Inside there is also a winnower for grain cleaning and a husk for groats production. For utility reasons, it was decided to install an electric motor as the alternative drive in the mill. This 3 kW motor (equipped with a gearmotor) transmits the drive directly to the wheel mounted on the windshaft via a belt (Fig. 11). In the case of the mill from Wierzbica, the engine is not hidden but rests on the floor.

During the start-up of the mill, there were several problems with the implementation of the ambitious goals: the possibility of turning the building with the sails to the direction of the wind was abandoned due to a problem with the centring of the windshaft and the tension of the belt connecting the shaft with the electric motor, and because the gear wheels cooperating with the head wheel were not connected (the gear was decoupled). After making the appropriate corrections (including centring the shaft), the museum conducted several shows that proved very popular with visitors. However, the problem remains that after 20 minutes the drive belt heats up and rotation becomes more difficult. Therefore, the presentation cannot last too long. But after a break of about 20 to 30 minutes, the belt is ready for the next show. Several times a year the belt must be lubricated with a special adhesive for drive belts.<sup>25</sup>

<sup>24</sup> The Radom Village Museum has in its collection three windmills – post mills with upright shafts. These are windmills from Dąbrowa Jastrzębska, Grabowiec and Wierzbica.

<sup>25</sup> According to Andrzej Żytnicki, an employee of the Radom Village Museum.



**Fig. 7:** Cross-section through the building of the windmill from Wierzbica in the Radom Village Museum, the red arrow marks the location of the electric motor, source: tender materials for windmill relocation and renovation (drawing by technician Jerzy Biedron).



**Fig. 8:** A general view of the windmill in Wierzbica, photo by F. Tomaszewski, December 2019.



**Fig. 9:** The upright shaft at the windmill from Wierzbica, photo by F. Tomaszewski, December 2019.



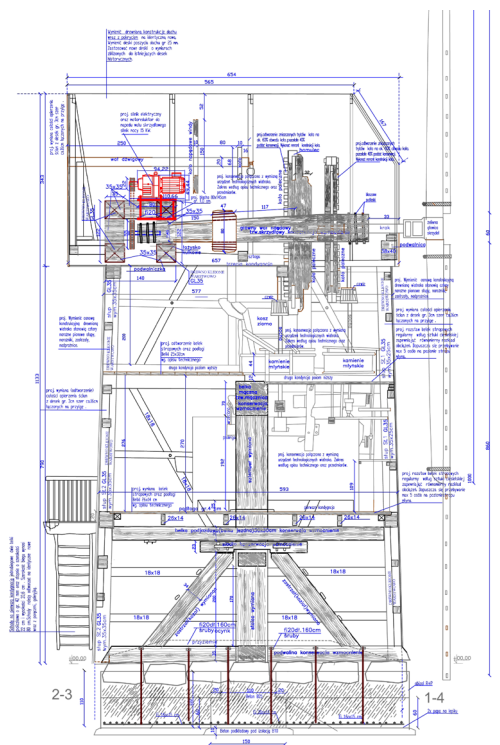
**Fig. 10, 11:** The windmill from Wierzbica at the Radom Village Museum; the electric motor with the gear motor transmitting the drive directly to the pulley mounted on the windshaft, photo by F. Tomaszewski, December 2019.

*A windmill from Zalesie in the Mazovian Countryside Museum in Sierpc*

In 2020, a major renovation was carried out on the post mill in the Mazovian Countryside Museum in Sierpc (Fig. 12–14). This windmill, dating back to around 1860, was relocated to the Museum from Zalesie in 1987.



**Fig. 12:** A windmill from Zalesie in the Mazovian Countryside Museum in Sierpc during restoration works; photo by J. Jankowski, May 2020.



**Fig. 13:** A windmill from Zalesie after renovation; source: <https://mwmskansen.pl> [accessed: August 24, 2022].



The purpose of the renovation was to enable the demonstration work of the mill. The windmill is equipped with two finger wheels driving two assemblies of millstones. On the first floor, there is a square sifter. The windmill is equipped with a 15 kW electric motor, which enables the mill to be run for demonstration. The location of the engine and the method of transmission of the drive is similar to the windmill from Grzawa (the engine mounted above the windshaft in the area of the tail wall transmits the drive via a chain to the toothed wheel on the shaft stub).

**Fig. 14:** Cross-section through the building of the windmill from Zalesie in the Mazovian Countryside Museum in Sierpc; the location of the electric motor is marked in red; source: construction design for the renovation and modernisation of the post mill – stage I, documentation update made in 2015; author: Zbigniew Chomiczewski, September 2019.



During the renovation, the building was completely dismantled and then reassembled. A many of the construction elements were replaced, including the crowntree (Fig. 12).

The first attempts to start the windmill with an electric motor caused failures in the chain transmission. However, the shortcomings were remedied and the windmill is now operational.

#### *A windmill from Markowa in the Croft Museum of Markowa Village*

Finally, one more mill should be noted in which an electric motor was installed to demonstrate the activation of at least the sails. It is a small windmill from Markowa, exhibited in the Croft Museum of Markowa Village, an open-air museum run by the Society of Friends of Markowa (Fig. 15). The windmill from Markowa represents a type of small peasant farmstead windmill and is equipped with a pair of millstones.



**Fig. 15:** *Windmill in the Croft Museum of Markowa Village*, source: <https://skansen-markowa.pl/index.php/zbiory-i-ekspozycje/wiatrak-kozlak.html> [accessed: August 24, 2022].

#### *Observations*

Installing motors in mills exhibited in open-air museums may raise doubts about the authenticity of the technical solutions, but it significantly facilitates the organisation of windmill operation demonstrations. The introduced new mechanisms, however, can be unreliable and are another element that requires care and regular service. From the examples described above, the chain drives used in the windmills from Grzawa and Zalesie should be distinguished as the least problematic and as interfering least with the original character of the mills. In the case of

the windmill from Grzawa, the engine power (3–4 kW) turned out to be insufficient. Previous experience shows that the optimum power of the drive source should be around 10 to 15 kW.<sup>26</sup>

### Windmills driven solely by the power of the wind

If, despite the translocation, the windmill has not lost the ability to use wind power (it has been located in an open area), it may be possible to run it. However, it should be borne in mind that the act of reefing the sails (i.e., spreading the sailcloth or wooden shakes) is cumbersome and time-consuming – but it is this way of setting the sails in motion that best reflects the historical truth. For organisational reasons, such windmill demonstration work takes place only occasionally (e.g., to coincide with other events). Below are examples of windmills whose technical condition allows setting the sails to the direction of the wind and their occasional start-up.

#### *A windmill from Zawada in the Łęczyca Croft open-air museum in Kwiatkówek*

In 2011, the Museum of Archeology and Ethnography in Łódź translocated a post mill from Zawada to the Łęczyca Croft open-air museum in Kwiatkówek near *Łęczyca* (Fig. 16–20). The building dates back to around 1820. It was brought to Zawada around 1900 from Kwiatkówek near *Łęczyca*.<sup>27</sup> Thus, this is an unusual case of a windmill returning (after 112 years) to its original location (of course, the object is not in the exact same place, but the margin for error is certainly not too large). The windmill stopped working in 1957. From that date until September 2011, the building survived almost unchanged. Before the translocation, the windmill represented the peak stage of the development of post-mill equipment. It should be emphasised that despite numerous modernisations, the building has retained its original character, that is, the driving force of the mill machines has always been the wind.

An architectural and conservation inventory was prepared and mycological expertise sought for the mill.<sup>28</sup> During the relocation, it was decided to return to the original nineteenth-century technological layout. As a result of the translocation and renovation, the structure of the building was largely reconstructed (the original structure was in a critical technical condition), while the preserved equipment remained original. However, the twentieth-century layers in the equipment were removed, which is why, for example, the mill rollers were not put in their previous location inside the mill, but are on show outside (Fig. 20). For utility reasons, it was decided to replace the windshaft only. A windshaft with a cast-iron head, from another demolished windmill, was used as a replacement. The original shaft with a wooden head is displayed near the object. Currently, it is possible to adjust the windmill's sails to the direction of the wind. The sails and the shaft and technological devices are not activated regularly, but their technical condition allows activation at any time (depending also on wind conditions). At least twice a year, at the end and beginning of the tourist season, the sails are rotated 180

<sup>26</sup> This is confirmed by historical examples of modernisation of windmills, e.g., an 11 kW motor was installed in the windmill in Pyzdry, and the windmill in Leszno (with a modernised process line with lower power demand) had a 7.4 kW motor fitted.

<sup>27</sup> POŚLUSZNA, Ewa, *Karta ewidencyjna zabytku architektury i budownictwa – wiatrak w Zawadzie* [Record card of a built heritage object – a windmill in Zawada, 1983 [in Polish]].

<sup>28</sup> WŁODARSKA, Danuta, ZAJĄC, Marcin, PRZYBYŁOWSKI, Wojciech, TOMASZEWSKI, Filip. *Projekt budowlany zespołu muzealnego w Tumie “Tum – perła romańskiego szlaku” – rozbiórka, odbudowa i translokacja wiatraka typu koźłowego w Zawadzie, dz. nr 68/2, 68/4, obręb Kwiatkówek* [Construction project of the museum complex in Tum “Tum – the pearl of the Romanesque trail” – demolition, reconstruction and translocation of a trestle-type windmill in Zawada, plots no. 68/2, 68/4, Kwiatkówek precinct], Łódź 2010–2011 [in Polish].

degrees,<sup>29</sup> which is extremely important from the conservation point of view, as it prevents their gravitational deflection.



**Fig. 16:** *A windmill from Zawada before its translocation; photo by F. Tomaszewski, 1999.*



**Fig. 18:** *A windmill from Zawada during reconstruction at the Łęczyca Croft in Kwiatkówek; the timber-frame structure was entirely recreated from new material; photo by F. Tomaszewski, November 2011.*



**Fig. 17:** *A windmill from Zawada during disassembly; photo by F. Tomaszewski, September 2011.*



**Fig. 19:** *A roller mill inside the windmill from Zawada (before translocation); photo by F. Tomaszewski, 1999.*

<sup>29</sup> According to Wojciech Bernasiak, a coordinator of the Łęczyca Croft in Kwiatkówek.



**Fig. 20:** *The same roller mill as an element of an outdoor exhibition in Łęczyca Croft; photo: F. Tomaszewski, July 2018.*

*A windmill – post mill from Dębno in the Kielce Village Museum in Tokarnia*

The post mill from Dębno in the museum in Tokarnia (Fig. 21) dates back to 1880.<sup>30</sup> The object was launched in 2010. At present, it is possible to set the sails to the direction of the wind, and the sails have the ability to rotate and move millstones. The location of the facility ensures favourable wind conditions. However, the transmission of the drive to the flour dresser turned out to be problematic. For safety reasons, as well as for conservation reasons (the interior equipment is original), demonstration of the windmill operation is limited to preparatory activities (adjusting to the wind and spreading the wooden shakes).<sup>31</sup>



**Fig. 21:** *A windmill from Dębno in the Kielce Village Museum in Tokarnia; photo by F. Tomaszewski, October 2012.*



**Fig. 22:** *A windmill from Zaduszniki in the Kujawsko-Dobrzyński Ethnographic Park in Kłóbka; photo by F. Tomaszewski, July 2016.*

<sup>30</sup> Website of the Kielce Village Museum in Tokarnia, accessed October 5, 2018, [http://mwk.com.pl/pl/sg/nasze\\_obiekty/park\\_etnograficzny\\_w\\_tokarni/zespol\\_budownictwa\\_wyzynnego](http://mwk.com.pl/pl/sg/nasze_obiekty/park_etnograficzny_w_tokarni/zespol_budownictwa_wyzynnego).

<sup>31</sup> According to Leszek Gawlik, an employee of the Kielce Village Museum in Tokarnia.



**Fig. 23:** An exhibition in the windmill from Zaduszyniki in the Kujawsko-Dobrzyński Ethnographic Park in Kłóbka, photo by F. Tomaszewski, July 2016.

#### *A windmill from Zaduszyniki in the Kujawsko-Dobrzyński Ethnographic Park in Kłóbka*

The post mill from Zaduszyniki in the Kujawsko-Dobrzyński Ethnographic Park in Kłóbka (Fig. 22, 23), erected around 1870,<sup>32</sup> is operated during folklore festivals. The setting of the object with the sails to the direction of the wind is then presented, and the sails and the windshaft are also rotated. Due to unfavourable wind conditions, the sails are moved manually, after unfastening the stone nut from the head wheel (so the millstones and other devices remain stationary).<sup>33</sup>

#### *A windmill from Wojtówka in the Ethnographic Museum in Toruń*

The post mill from Wojtówka, dated 1896, is exhibited in the Maria Znamierowska-Prüfferowa Ethnographic Museum in Toruń (fig. 24). The windmill was translocated to the museum in 1991. It has all the equipment characteristic of this mill type and a very coherent and legible interior exhibition, including not only technological devices but also a collection of hammers and pickaxes for dressing millstones, documents related to the mill and even a bunk on which the miller had the opportunity to rest. The windmill is equipped with two headwheels driving two pairs of millstones. On the first floor, there is a flour dresser. The windmill, like the post mill from Zaduszyniki in Kłóbka, has the ability to rotate on the trestle. The sails and internal mechanisms are revolved for maintenance purposes only.

#### *Windmills from Wodziejany, Ruska Wieś and Dobrocin in the Museum of Folk Architecture – Ethnographic*

<sup>32</sup> Website dedicated to windmills in Poland, accessed October 5, 2018, <http://wiatraki.org.pl/>.

<sup>33</sup> According to Michał Kwiatkowski, an employee of the Kujawsko-Dobrzyński Ethnographic Park in Kłóbka.



**Fig. 24:** *A windmill from Wojtówka in the Maria Znamierowska-Prüfferova Ethnographic Museum in Toruń; photo by F. Tomaszewski, December 2019.*

### *Park in Olsztynek*

The Museum of Folk Architecture – Ethnographic Park in Olsztynek boasts a collection of four windmills, three of which are technically operational. These are a post mill from Wodziany, a paltrok from Ruska Wieś and a smock mill from Dobrocin.

The post mill from Wodziany (fig. 25), dating back to 1773,<sup>34</sup> was moved to the open-air museum in 1972–1974. In 2010, it underwent a thorough renovation. During the renovation works, a decision was made to restore the windmill's equipment to its original condition. The exhibition inside the mill includes a technological program characteristic of the end of the eighteenth century. All devices considered secondary (including mill rollers) were moved to a separate building as exhibits. After renovation, the windmill was put into operation for museum shows.<sup>35</sup> Unfortunately, soon after that, a serious failure occurred: the crowntree broke – the most important construction beam in the mill, suspended on the top of the main post (a vertical pole around which the buck of the mill revolves). Since the side walls of the windmill and the ceilings of the third floor are suspended on the crowntree, its replacement required the disassembly and reassembly of practically the entire building. The renovation of the windmill was completed in 2017. The windmill from Wodziany has a unique feature that distinguishes it from other windmills in the collections of Polish open-air museums: the rear (wider) side of each sail can be filled with sailcloth, while the front side has pine laths. This filling of the sails is historically justified by archival iconography. Currently (2023) the sails of the windmill must be balanced, after which an attempt to start them is to be carried out (for now, without connecting internal devices).

The paltrok from Ruska Wieś (fig. 26) was erected in the second half of the nineteenth century. It was translocated to the museum in 1976–1977. The driving mechanism of the windmill (windshaft with a head wheel) has been preserved, but the grinding devices, that is, the millstone set-up, have not been preserved.<sup>36</sup> For exhibition purposes, only the tun case (without millstones inside), the crane for lifting millstones and the sifter were reconstructed. After the renovation carried out in 2021, the windmill has been able to adjust the building with sails to the direction of the wind. It is also possible to rotate the sails and the windshaft.

The smock mill from Dobrocin (fig. 27) dates back to the second half of the nineteenth century. The mill was in operation until 1950. In the years 1962–1965 it was translocated to the open-air museum in Olsztynek. In 2015, as a result of a storm, the sails were damaged and had to be dismantled.<sup>37</sup> After this accident, the museum commissioned the necessary documentation of the renovation of the mill, which was completed in 2021–2022. Comprehensive restoration works included not only the timber-frame structure and sheathing of the windmill, but also

<sup>34</sup> KUFEL, Tadeusz. *Muzeum Budownictwa Ludowego. Park Etnograficzny w Olsztyнку* [Museum of Folk Architecture – Ethnographic Park in Olsztynek]. Olsztynek 1999 [in Polish].

<sup>35</sup> CHODKOWSKA, SABLJAK-OLEŃDZKA. *O wiatrakach...*, p. 34.

<sup>36</sup> *Ibidem*, p. 127.

<sup>37</sup> *Ibidem*, p. 57.

technological equipment: the windshaft was replaced, and the tail poles used to adjust the “cap” with the sails to the direction of the wind were restored. The windmill has a preserved upright shaft driving three pairs of millstones located on the first floor. After renovation, from the technical point of view, the mill is fully operational.

### *A windmill from Czacz in the Museum of Milling and Water Equipment of Rural Industry in Jaracz*

A valuable example of an operational windmill is a post mill from Czacz, dating from 1842, currently in the Museum of Milling and Water Equipment of Rural Industry in Jaracz – a branch of the National Museum of Agriculture and Agri-Food Industry in Szreniawa (fig. 28). The object was translocated to the museum in 2008–2010. When it comes to the scope of operation of this object, the situation is analogous to the windmill in the museum in Klóbka. Every autumn, a milling festival is organised, during which the sails are turned on and setting the building with sails to the direction of the wind is demonstrated. Unfortunately, in this case the grinding devices remain stationary.



**Fig. 25:** A windmill from Wodziańy (with cloth partially spread on sails) in the Museum of Folk Architecture – Ethnographic Park in Olsztynek; photo by M. Kowalczyk, May 2018.



**Fig. 26:** A windmill from Ruska Wieś in the Museum of Folk Architecture – Ethnographic Park in Olsztynek; state as of January 2022; source: <https://muzeumolsztynek.pl/wiatrak-z-ruskiej-wsi-zostal-wyremontowany/> [accessed: August 24, 2022].

## Summary and conclusions

The best conservation method for technical monuments is maintaining the monument's efficiency and making its primary function clear.<sup>38</sup> However, it should be borne in mind that in the case of windmills, the need to maintain the use value by restoring the technical efficiency of the mill may conflict with the need to preserve the authenticity of the substance of the monument. A fundamental question arises at this point: what is the more important

<sup>38</sup> AFFELT, Waldemar J. *Dziedzictwo techniki w kontekście rozwoju zrównoważonego* [The heritage of technology in the context of sustainable development]. In: Szymygin, Bogusław (ed.). *Współczesne problemy teorii konserwatorskiej w Polsce*, Warszawa – Lublin: ICOMOS – Politechnika Lubelska, 2008, p. 15 [in Polish].



**Fig. 27:** A windmill from Dobrocin in the Museum of Folk Architecture – Ethnographic Park in Olsztynek; state as of May 2022; source: <https://muzeumolsztynek.pl/4647-2/> [accessed: August 25, 2022].



**Fig. 28:** A windmill from Czarcz (with wooden shakes spread on sails) in the Museum of Milling and Water Equipment of Rural Industry in Jaracz – pictured during the milling festival; photo by F. Tomaszewski September 18, 2011.

component of authenticity – function or substance?<sup>39</sup> And are they the most important criteria for the justification of authenticity? According to W. J. Affelt “The message about the purpose of the object’s creation and existence is particularly important, best illustrated by its functioning, or at least by making its function clear enough to mentally reconstruct the image. This guarantees the integrity of the monument because only its completeness enables a comprehensive reconstruction of the record of history – the story of the past. An important argument of authenticity is traces of antiquity, i.e. patina – commonly removed today as part of renovation works.”<sup>40</sup>

In the field of restoring Polish windmills as working mills, only the first steps have been taken – and most initiatives so far have encountered significant problems. The success is in the very fact that these attempts have been made. The following conclusions can be drawn from the analysed case studies:

1. Before making a decision to restore the technical efficiency of a windmill, a historical evaluative analysis should be undertaken to determine whether restoring the windmill’s original function (reconstruction of the milling system) is of primary importance and possible at all.

<sup>39</sup> PRARAT, Maciej. *Wartość funkcji w ochronie drewnianych młynów – na wybranych przykładach z terenu Pomorza* [The value of the function in the protection of wooden mills – on selected examples from Pomerania]. In: Szmygin, Bogusław (ed.). *Wartość funkcji w obiektach zabytkowych*, Warszawa: ICOMOS – Muzeum Pałac w Wilanowie – Politechnika Lubelska, 2014, p. 236 [in Polish].

<sup>40</sup> AFFELT. *Dziedzictwo techniki...*, p. 13.



2. One should not try to run windmills at all costs if it would involve too much interference in the historical substance of the monument (especially in the case of in situ conservation); the most valuable objects, without a preserved full technological system, should be secured in the form of exhibits.<sup>41</sup>

3. When evaluating the equipment, all layers should be taken into account, including those from the period after World War II; omitting valuable layers (following the trend for conservation purism) when restoring original technological systems should be considered inappropriate.<sup>42</sup>

4. The technical achievements of past generations should be treated with respect – previous experience has shown that operating a windmill required a lot of practical experience; the current generation has to learn everything “anew.”

5. During major repairs, the participation of specialists in the field of traditional milling technology is essential; the involvement of skilled carpenters alone is insufficient. A very important aspect during work aimed at restoring a windmill to technical efficiency is the centring of the windshaft and other drive shafts. Without it, the proper operation of gears, whether cogwheel or belt, will not be possible. It is most advantageous to mount the drive shafts on so-called self-lubricating bearings with easily adjustable self-aligning bushes. More difficult to centre are shafts bearing on fixed wooden bearings, which are often used in windmills. Activities requiring specialist knowledge and experience also include dressing (grooving) millstones, sewing transmission belts, strapping sifters and generally servicing roller mills.

6. From the point of view of use (due to unfavourable wind conditions and problems with the drive belt transmission), it seems acceptable to limit the number of machines moved by the wind to the millstones. Other equipment can be left static for safety reasons but may interfere with the readability and comprehensibility of the mill operation.

7. In the case of using an alternative, modern electric drive, the optimal solution is block drive units (engine with gear motor) located above the wing shaft in the attic area. Such a solution was used in windmills from Zalesie (in the Mazovian Countryside Museum in Sierpc) and from Grzawa (in the Upper-Silesian Ethnographic Park Museum in Chorzów). These solutions are uncomplicated and fully reversible. The engine power should be selected individually, but experience so far shows that it should not be less than 10 kW.

8. After carrying out restoration works, it is necessary to ensure the proper operation and maintenance of the mill by a trained person.

In light of the above, it is clear that launching a windmill requires specialist knowledge in various fields and that it cannot be perceived as a one-time investment. On the contrary, keeping windmills in operation not only involves continuous expenditure incurred by museums or other managers of these mills, but also above all should be regarded as a transfer of knowledge to the younger generation.

On the basis of the experiences discussed above, five main problems related to the relocation, commissioning and maintenance of historic windmills have been identified:

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<sup>41</sup> PRARAT. *Wartość funkcji...*, p. 237.

<sup>42</sup> Cf.: BAZELMANS, Jos, VAN HOF, Jan, NIENHUIS, Geert, TROOST, Gerard, and PFEIFFER, Wouter (2012). A Future for Mills...

1. Lack of suitable wind conditions at the new windmill sites (after relocation).
2. Risk of loss of original historic fabric due to mill improvement works (e.g., replacement of gear teeth, drive shafts, etc.).
3. Lack of specialist millwrights who would be able not only to set up the process line but also to maintain the machinery on an ongoing basis.
4. Limited possibilities to safely present an exhibition that is in motion and presents various risks to visitors.
5. The difficulty of defining the criteria for the evaluation of the windmill equipment and the related authentication of the stratigraphy (showing the history of transformations and modernisations and answering the question of which pieces of equipment should be reconstructed and put into operation).

These observations, although derived from the Polish experience, can provide universal premises for activities in the field of protection and conservation of windmills and their preparation for public opening and proper interpretation of the production process. What is more, they are strongly rooted in the concept of working museums, which has recently been very well characterised by Jamie Eves in his essay on the subject:<sup>43</sup> “Compared to static museums, working museums can appear noisy, chaotic, and sometimes messy. Sometimes new acquisitions pile up faster than the staff can catalog them. Exhibits rooms are in flux, as new artifacts are added to permanent exhibits (which are never really permanent), and as older changing exhibits are dismantled and replaced with new ones. There is bustle and excitement.”

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<sup>43</sup> EVES, Jamie, *Working Museums*. <https://millmuseum.org/2019/05/19/working-museums/> accessed July 1, 2024.

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