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The beginnings of museology
In this paper, we deal with the beginnings of museology, trying to find the common origin of its many contemporary offspring. Rather than define museology, we aim to discuss the idea of museology. We assume that beneath the diverse manifestations of museology one can see today, there is a common root and we call this root the idea of museology. Based on examples tracing the history of other scientific disciplines, in this paper we track two developmental stages in the field of museology: the development from an idea to professional knowledge, and the development from professional knowledge to academic discipline. By these means, we aim to establish some of the crossing points in the progress of museology as a science.

Keywords: museology (idea, history, discipline), beginnings, museum studies, history of science

Introduction: Constant beginnings

If there were a competition for the most popular quote about museology, the following quote, from 1883, would be a very serious candidate:

If somebody spoke about museology as a science thirty or twenty years ago, he would have encountered a compassionate or contemptuous smile. Now, of course, it's different. Museums existed then, as today, though certainly not always in their present form, equipment and use. It is sufficient to note that they gradually developed from the cabinet of curiosities of the fifteenth and sixteenth centuries into the systematically organized institutions of our time .[1]

It is from a well-known introductory text from the *Zeitschrift für Museologie und Antiquitätenkunde sowie verwandte Wissenschaften* [Journal of Museology and Antiquarianism as well as related sciences], No. 15, 1883. But where might one encounter this quote? *Zeitschrift für Museologie und Antiquitätenkunde* was published in Dresden by Johann Georg Theodor Grässe (1814–1885), a

[1] GRÄSSE, Johann Georg Theodor. Die Musologie als Fachwissenschaft. In: *Zeitschrift für Museologie und Antiquitätenkunde sowie verwandte Wissenschaften*, Vol. 15, 1883, p. 1. "Wenn jemand vor dreissig, selbst vor zwanzig Jahren von der Museologie als einer Fachwissenschaft gesprochen oder gescliriehen hätte, würde er bei vielen Personen einem mitleidigen, geringschätzenden Lächeln begegnet sein. Jetzt freilich ist diesanders. Museen existierten damals natürlich ebenso wie heute, wenn auch nicht immer in ihrer jetzigen Gestalt, Ausstattung und Benutzung. Es bedarf keiner nähern Auseinandersetzung, wie sich dieselbe nach und nach aus den Kuriositätensammlungen des 15. und 16. Jahrhunderts zu den systematisch gegliederten Instituten der Jetztzeit entwickelt haben, wir wollen nur darauf hinweisen".

cultural historian and museum expert, from 1878 to 1885.[2] It is unlikely a modern reader would encounter this quote while browsing the original journal, even though it has been digitised and is today available online.[3] One is more likely to come across it in other people's writings: for example, Zbyněk Zbyslav Stránský in the 1960s, Evzen Schneider in the 1970s, Lynne Teather in the 1980s, and Peter van Mensch or Ivo Maroević in the 1990s.[4] It is also cited in publications of the twenty-first century.[5] Why is this quotation so popular?

Is it because the concept of museology as a science could not be reliably established throughout the indicated period? If so, can one talk about museology as a science at all? It is somewhat frustrating to even need to discuss such a question, since museology has been recognised, one way or another, as a discipline within the philosophy and history of science for well over a century and a half.[6] In the above quotation, it is noticeable that a direct connection is established with the "cabinet of curiosities", which Grässe refers to as the forerunner of the museum. The text suggests that it is possible to talk about museology as a "special science" precisely because museums became the "systematically organized institutions of our time". In other words, the basic premise of this nineteenth-century determination is clear: museology is the science of museums. Nevertheless, it was precisely this definition that was constantly being reconsidered during the twentieth century. If, in the first half of that century, museology was seen as one of the disciplines concerned with spreading and promoting knowledge[7], the second half of the century brought a sharp division between museology as the "science of museums" and museology as the "science of museality" (that is, the science of "the relationship between man and his reality").[8] This second stream ultimately led to a contemporary understanding of museology as a science of heritage[9], sometimes referred to by the newly coined term

[2] See ANANIEV, Vitalij Gennadievič and METELKIN, Evgenij Nikolaevič. I. G. T. fon Grasse i ego rol′ v razvitii muzeologii, vtoroj poloviny XIX v [I. G. T. von Grässe and his role in the development of museology in the second half of the nineteenth century]. In: *Voprosy muzeologii*, vol. 12, 2015, is. 2, pp. 17–21. [In Russian].

[3] https://www.europeana.eu/portal/en/record/9200143/BibliographicResource_2000069469470.html; accessed 31 March 2019.

[4] STRÁNSKÝ, Zbyněk. Pojam muzeologije [The Concept of Museology]. In: *Muzeologija*, 1970, 8, p. 5 in Croato-Serbian; translation from the International Seminar on Museology held in Brno, 1969. SCHNEIDER, Evzen. La voie du musée, exposition au musée Morave. In: *Museum*, 1977, vol. 29, is. 4, p. 183; TEATHER, Lynne. Museology and its traditions: The British experience, 1845–1945, PhD thesis, University of Leicester, 1983, p. 2; MENSCH, Peter van. Towards a methodology of museology, PhD thesis, University of Zagreb, 1992, note 2.

[5] LOCHER, Hubert (ed.) *Museen als Medien – Medien in Museen. Perspektiven der Museologie*. Munchen: Müller-Straten, 2004, p. 110; SMEDS, Kerstin. Museum science? In: *Nordisk Museologi*, 2018, 1, p. 154.

[6] See DIXON, Roland B. Some Aspects of North American Archeology. In: *American Anthropologist, New Series*, vol. 4, 1913, 15, pp. 573–574; SARTON, George. Introduction to the History and Philosophy of Science (Preliminary Note). In: *Isis*, vol. 1, 1921, 4, p. 29. See also DESVALLÉES, André and MAIRESSE, François. Sur la muséologie. In: *Culture & Musées*, 2005, 6, pp. 131–155.

[7] SARTON, Introduction to the History…, p. 29.

[8] "Certains chercheurs, surtout d'Europe centrale, privilegient une vision plus large et plus theorique de la museologie. ... L'objet de la museologie n'est plus le musee mais la 'musealite', une relation specffique de l'homme avec la realite, relation qui est ti la fois connaissance et jugement de valeur: elle conduit a selectionner des objets qu'elle juge dignes d'etre conserves indefiniment et transmis a la societe future. Ainsi definie, la 'musealite' semble correspondre en frangais au concept de patrimoine ou de ce qu'on pourrait appeler la 'patrimonialite'." GOB, André and DROUGUET, Noémie. *La muséologie. Histoire, développements, enjeux actuels*. 4e édition. Paris: Édition Format Kindle de Armand Colin, 2014.

[9] MAROEVIĆ, Ivo. *Introduction to Museology: The European Approach*. Munich: Vlg. Dr. C. Müller-Straten, 1998.

"heritology".[10]

Bearing in mind these premises, in this paper we deal with the beginnings of museology, trying to find the common origin of its many contemporary offspring. In seeking the "beginnings" of the discipline, we take Gadmer's lead in seeking the "knowledge of things in their youth"[11], in the sense that the thing itself is not yet fully developed but still at a point from which various outcomes and manifestations are possible. In other words, we are not aiming to define museology, but rather to discuss the idea of museology. We assume that beneath the diverse manifestations of museology one can see today there is a common root and we call this root the idea of museology. Based on examples tracing the history of other scientific disciplines, in this paper we track two developmental stages: the development from an idea to professional knowledge, and the development from professional knowledge to academic discipline. By these means, we aim to establish some of the crossing points in the progress of museology as a science.

From idea to Fachwissenschaft

An overview of contemporary definitions applied to the term "museology" throws up as many as five meanings. The first is that it refers to anything that concerns museums. The second meaning, commonly applied in Western Europe, recognizes museology as the science of museums, covering the history of museums, their social role, their organisation, and all issues pertaining to research, preservation, dissemination and so on. The third definition points to the way museology has been widely understood in Central and Eastern Europe since the 1960s: as a field of scientific research that examines the relationship between man and his reality, with museums being only one manifestation of that relationship. The fourth, or "new-museological" meaning, which dates from the 1980s, emphasises the social role of the museum and its interdisciplinary character, along with new forms of expression and communication. Finally, the fifth definition incorporates all the previous ones and represents museology as a broad field of research in the domain of theoretical and critical thinking about the relationship between man and his reality, expressed through the documentation of reality that can be objectified.[12]

The question thus arises: do these "versions" of museology have a common beginning? It is possible to speak about the beginnings of museology in various ways. It has become commonplace to say that the "father of museology" is Samuel Quiccheberg (1529–1567)[13], though some ascribe this role to his contemporary, Ulisse Aldrovandi (1522–1605).[14] On the other hand, as far as current research has uncovered, the term museology was first recorded

[10] ŠOLA, Tomislav. Towards a possible definition of museology. Paper presented at the ICOFOM Annual Conference. Paris: ICOFOM, 1982.

[11] GADAMER, Hans-Georg. *The Beginning of Philosophy*. London: Bloomsbury Academic, 2000, pp. 9–18.

[12] DESVALLÉES, André and MAIRESSE, François. (eds). *Key Concepts of Museology*. Paris: Armand Colin, 2010, pp. 53–56.

[13] These statements are repeated throughout the twentieth century: See MURRAY, David. *Museums, their history and their use*. Glasgow: J. MacLehose, 1904, p. 28; STRÁNSKÝ, Pojam muzeologije.., pp. 5–6; WAIDACHER, Friedrich. *Handbuch der Allgemeinen Museologie*. Wien: Böhlau, 1999, p. 84.

[14] ROMANO, Marco, CIFELLI, Richard and VAI, Gian Battista. Natural history: first museologist's legacy. In: *Nature*, 2015, 517, p. 271; HAXHIRAJ, Marinela. *Ulisse Aldrovandi. Il museografo*. Bologna: Bononia Univerity Press, 2016.

in 1839[15]. Yet even before that, the terms *Museum museorum* (1704)[16] and *Museographia* (1727)[17] were used. And in the twentieth century, several "initial" years of the discipline are mentioned, for example, International Conference in Madrid organised by the International Museums Office (IMO) in 1934[18] and the establishment of ICOFOM, the International Committee for Museology of the International Council of Museums (ICOM) in 1977. To some, especially in Central Europe, Z. Z. Stránský is recognized as "the pioneer of contemporary museology"[19]. To these starting points we could add other examples of local origins (for example, in the Mediterranean region, Western/Eastern Europe, the USSR or the USA). It is clear that some of these "beginnings" are metaphorical, some symbolic, some disciplinary, some institutional and some geographical. But for now, we will take the patrimonial approach and consider briefly the two alleged "fathers of museology".

In the sixteenth century, a book was published that was to become known as "the first museum treatise" and its author as the "father of museology". Entitled *Inscriptiones vel tituli Theatri amplissimi, complectentis rerum universitatis singulas materias et imagines eximias etc.*[20] it was written by a Belgian doctor and librarian at the Bavarian court called Samuel Quiccheberg (1529–1567). A comprehensive translation of the title page illustrates its descriptiveness:

Inscriptions or Titles of the Most Ample Theatre That Houses Exeplary Objects and Exceptional Images of Entire World, So That One Could Also Rightly Call It A: Repository of artificial and marvellous things, and every rare treasure, precious object, construction, and picture. It is recommends that these things be brought together here in theatre so that by their frequent viewing and handling one might quickly, easily, and confidently be able to acquire a unique knowledge and admirable understanding of things.[21]

Quiccheberg's book is, in essence, a guide to arranging a collection. Close to the Bavarian court, its author had in mind the collection of Albrecht V. However, it is not an instruction for arranging a specific collection, but rather strives to offer more general, even universal solutions – bearing in mind the perspective of the time to which it belongs. It is important to point out that Quiccheberg does not claim that this is a work of specific science or discipline, but that "there is not a single discipline under the sun, nor a skill, which would not seek for its own means of performing the prescribed arrangement".[22] Another "father figure", Ulisse Aldrovandi (1522–1605), was an Italian naturalist, and also a "professor, physician, botanist, collector, philosopher, critic, mathematician, bibliophile, advisor to the Grand Duke of

[15] AQUILINA, Janick Daniel. The Babelian Tale of Museology and Museography: a history in words. In: *Museology: International Scientific Eletronic Journal*, 2011, 6, p. 1–20.

[16] VALENTINI, Michael Bernhard. Museum Museorum, oder vollständige Schau-Bühne aller Materialien und Specereyen, nebst deren natürlichen Beschreibung. Franckfurt am Mayn :In Verlegung Johann David Zunners,1704; accessed 31 March 2019, https://www.biodiversitylibrary.org/item/30610#page/3/mode/1up.

[17] NEICKELIUS, Caspar Friedrich. *Museographia oder Anleitung zum rechten Begriff und nützlicher Anlegung der Mvseorvm Oder Raritäten-Kammern*. Leipzig: Hubert, 1727; accessed 31 March 2019, https://reader.digitale-sammlungen.de/resolve/display/bsb10051211.html

[18] The International Museums Office (IMO) / Office International des Musées (OIM) was founded in Paris by the League of Nations in 1926.

[19] WAIDACHER, *Handbuch der Allgemeinen Museologie*…, p.14.

[20] QUICCHEBERG, Samuel. *Inscriptiones vel tituli Theatri amplissimi, complectentis rerum universitatis singulas materias et imagines eximias etc.* Monachii: Adamus Berg, 1565. Accessed 31 March 2019, from the Österreichische Nationalbibliothek website: http://data.onb.ac.at/ABO/%2BZ178696704.

[21] MEADOW, M. A. (ed.), *The First Treatise on Museums. Samuel Quiccheberg's* Inscriptiones, *1565*. Los Angeles: Getty, 2013, p. 61.

[22] MEADOW, *The First Treatise on Museums*…, p. 74.

Tuscany and numerous Italian and French collectors". He was praised for "the vastness of his erudition and his naturalistic collection [and] the quality, the organicity and the originality of his thought in the panorama of modern museography".[23] In 1603, Aldrovandi dictated this testament, which is today recognized as "a remarkable and inspiring manifesto of scientific museology".[24] Similarly to Quiccheberg's text, he wrote about systems for arranging an ideal collection[25], although he was focused on presenting a natural collection rather than a universal one. Certainly, this work offers a sixteenth-century understanding of the concept of science, from an age where there the modern division of disciplines did not yet exist. As such, it presents the idea of comprehensive knowledge based on correspondence and similarity and, therefore, on special analogous classifications and taxonomies in the service of an ample understanding of the world.[26]

A similar approach was still prevalent in the seventeenth century.[27] The first half of the eighteenth century, specifically 1727, saw the publication of an interesting edition in German under the title *Museographia oder Anleitung zum rechten Begriff und nützlicher Anlegung der Mvseorvm Oder Raritäten-Kammern* [Museography or Guide for the Proper Understanding and Useful Creation of Museums and Chambers of Rarities].[28] As far as is known, this was the first documented use of term *museography*, which is still in use today (though with changed connotations). The book's author was Kaspar Friedrich Jencquel, a Hamburg merchant, but his pseudonym, Caspar Friedrich Neickelius, appears on the front page. In a wide-ranging book of 492 pages, the first three chapters list and describe more than a hundred "repositories" (*Behältnisse*) which existed at that time, as well as libraries and collections of objects that had already been disbanded. The fourth chapter of the book gives instructions for decorating a chamber of rarities, founded on theoretical conclusions based on the examples described in the preceding chapters. However, what is especially interesting about this book is that, beside its author, another figure appears: *the commentator*, Wroclawian doctor Johan Kanold. A knowledgeable expert on the topics that Nickelius writes about, Kanold was hired by the publisher to review the author's claims in the book. Indeed, in the preface of the book, Kanold emphasizes Nikelius' "illiteracy and dilettantism" and then, in the edition itself, he corrects and complements the author's descriptions, apparently determined to make the book at least acceptable for the concerned reader[29]. This curiosity points to the popularity of the topic in the wider social ("commercial-dilettante") circles, but also to the care taken by experts with knowledge of the field to prevent it from being degraded.[30]

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[23] HAXHIRAJ, Ulisse Aldrovandi…, back cover.

[24] ROMANO, Natural history…, p. 271.

[25] Regarding Aldrovandi's collection see L'Erbario di Ulisse Aldrovandi: Una collezione di piante essiccate del XVI secolo, accessed 31 March 2019, http://botanica.sma.unibo.it.

[26] GREENHILL, Eileen Hooper. *Museums and the Shaping of Knowledge*. London – New York: Routledge, 1992, pp. 89–91.

[27] See IMPEY, Oliver and MACGREGOR, Arthur (eds.). T*he Origins of Museums: The Cabinet of Curiosities in Sixteenth and Seventeenth Century Europe*. Oxford: University Press, 1985.

[28] NEICKELIUS, Museographia oder Anleitung.

[29] See GOEING, Anja-Silvia. Mapping curiosity: Kaspar Friedrich Jencquel's Recommendations for Visits of Cabinets in Europe (1727), accessed 31 March 2019, https://curiositas.org/mapping-curiosity-kaspar-friedrich-jencquels-recommendations-for-visits-of-cabinets-in-europe-1727.

[30] However, the beginning of truly studious research into this topic had to wait for the beginning of the twentieth century. Cf. SCHLOSSER, Julius von. *Die Kunst- und Wunderkammern der Spätrenaissance: ein Beitrag zur Geschichte des Sammelwesens*. Leipzig: Klinkhardt & Biermann, 1908.

The changes in the intellectual, cultural and social climate in the late eighteenth to early nineteenth century, which brought to fruition both capital philosophical concepts and brutal revolutionary acts of decapitation, also caused a change of attitude towards the past and its remains. Interest in *rarity* and *curiosity* seem to have been lost under the pressures of enlightenment rationality[31]. But here we suggest another possible reason why this happened: the concepts of rarity and curiosity gave way to the idea of *heritage*, embodied in the forms and objects of the "past", especially those which were considered unusual in contemporary society. The idea of heritage as a public/national good meant that in the eighteenth and nineteenth centuries museums, the displeys that formerly belonged to private collections and now exposed on newfound altars of the nation, became spaces open to the public and thus the object of wider interests.[32] In the meantime, the term *museology* appeared, indicating the need to reflect on the role of the museum. As mentioned above, as far we know today, the term *museology* was first recorded in 1839, in German, in the title of Georg Rathgeber's book, *Aufbau der Niederländischen Kunstgeschichte und Museologie* [The Arrangement of the Dutch History of Art and Museology].[33] In fewer than two hundred pages, the author offers a method of classifying an array of art collections within a museum. It is worth mentioning the connection of museology with the then young discipline of art history.[34] From that time, museology and art history were be intertwined in order to make the past "visible and legible".[35]

Museology as an academic discipline

There are, of course, many disciplines whose research objectives lie in the study of forms and objects inherited from the past. Archaeology, history, anthropology and many other fields recognize the importance of displaying their own scientific corpus in a museum context. This generated a present and evolving need for museological knowledge, which is how we came to the point where Johann Grässe made the well-known claim with which we opened this paper: that museology can be referred to as "a science"[36] or "a branch of science"[37] (Fachwissenschaft). We have now come to the point where museology becomes not only a question of *what-is-done*, but also *what-is-learned*.

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[31] GREENHILL, Museums and the Shaping of Knowledge…, p. 167.

[32] Cf. POULOT, Dominique. The Birth of Heritage: 'le moment Guizot'. In: *Oxford Art Journal*, vol. 11, 1988, 2, pp. 40–56; ERIKSEN, Anne. *From Antiquities to Heritage: Transformations of Cultural Memory*. Oxford – New York: Berghahn, 2014.

[33] RATHGEBER, Georg. *Aufbau der Niederländischen Kunstgeschichte und Museologie*. Weißensee: G. F. Großmann, 1839; accessed 31 March 2019, https://books.google.rs/books?id=KbYnGwAACAAJ&printsec=frontcover&hl=sr&source=gbs_ge_summary_r&cad=0#v=onepage&q&f=false.

Truth be told, there is an even earlier appearance of the term: in Karl Ottfried Müller, *Handbuch der Archäologie der Kunst* (Manual of Archaeology), published in Breslau (Wroclaw) in 1830. On page 284, Müller states that more can be found "on museology"("zur Museologie") in the book by Karl August Böttiger, Über Museen und Antikensammlungen: eine archäologische Vorlesung (Leipzig 1808), but there is no term *museology* in that publication, just *museography*. See also: WALZ, Markus. The German voice in the "Babelian tale of museology and museography": creation and use of terms for museum science in Germany. In: *Museologica Brunensia*, vol. 7, 2018, 2, pp. 5–18.

[34] In that sense, one should also mention engagements and research by German art historian and archaeologist Johann Joachim Winckelmann (1717–768).

[35] Cf. PREZIOSI, Donald. Art History and Museology. Rendering the Visible Legible. In: MACDONALD, Sharon (ed.) *A Companion to Museum Studies*. Malden, MA – Oxford: Blackwell Publishing, 2006, pp. 50–63.

[36] TEATHER, Museology and its traditions…, p. 2.

[37] MENSCH, Towards a methodology of museology…, p. 8.

However, linguistic differences, such as those between "science" and "Wissenschaft", are not irrelevant in this case. Let us note, as did the perceptive contemporary scholar Bas van Bommel, that "the concept of 'science' never took on the comprehensive and pretentious meaning that the term 'Wissenschaft' obtained in Germany". Among other things, here we can observe a root problem in the terminological differences between continental term *museologie* and its Anglo-Saxon equivalent *museum studies*. On the other hand, let us also bear in mind the following observation by the same author: "Without a doubt, the most influential concept in German university history is that of the 'unity of teaching and research' [Einheit von Lehre und Forschung]. From the late nineteenth century onwards, university foundations and reforms both in and outside of Europe have been inspired by the – originally German – idea that universities should not only aim at transmitting knowledge by means of education, but also at increasing it by way of scientific research".[38] In other words, in order to determine the beginnings of museology as an academic discipline, we must ask ourselves what is its place in the context of the *unity of teaching and research*.

As we will see soon, the correlation between museology and museums themselves (as fields of research) is inseparable from the beginnings of museology as a modern academic discipline. But first, let us note that the issue of becoming an academic discipline is of great importance for a branch of knowledge. Taking our lead from Jacques Le Goff, who suggested that "it would not be an exaggeration to say that the teaching of history marked its birth as a branch of learning"[39], we can say that museology became a scientific discipline precisely from the moment when it began to be taught as a distinct subject. As has been noted in the philosophy of science, for specialist knowledge (based on accumulated experience in a particular field) to become a scientific discipline, it is necessary to establish theoretical frameworks and for these to be disseminated through the educational process. *Theoretical frameworks* allow a unified view of the diverse elements of knowledge[40] and the *educational process* transmits the current measure of knowledge, but also critically re-examines it.

In an academic context, museology began as a technique for creating museum displays pertaining to specific scientific disciplines. The first major initiative in museological education could be traced back to 1856, when the Spanish Government founded the Escuela Superior de Diplomatica in Madrid as an institution to train archivists, librarians and other professionals in charge of national heritage[41]. L'Ecole du Louvre, a higher education institution, was founded in Paris in 1882 with the aim of training researchers in the fields of archaeology, history of art, anthropology and classical languages, using the collections of the famous museum. However, it was not until 1927 that the first course in museography was held at this school.[42]

In the meantime, museology could be encountered in various contexts, as evidenced, for example, by the invitation to the first International Congress of Entomology in Europe in

[38] BOMMEL, Bas van. Between 'Bildung' and 'Wissenschaft': The 19th-Century German Ideal of Scientific Education. In: *European History Online*, Mainz: Leibniz Institute of European History (IEG), 14 December 2015. Accessed 31 March 2019, http://www.ieg-ego.eu/bommelb-2015-en URN: urn:nbn:de:0159-2015120917 [2019-01-02].

[39] LE GOFF, Jacques. Faut-il vraiment découper l'histoire en tranches? [Must We Divide History Into Periods?] Original: "*l'enseignement constitue en effet la pierre de touche de l'histoire comme connaissance* ", Paris: Éditions du Seuil, 2014, p.16. English edition translated by Malcolm DeBevoise, New York: Columbia University Press, 2015, p. 4.

[40] ROSENBERG, Alex. *Philosophy of Science: A Contemporary Introduction*. London and New York: Routledge, 2012, p. 116.

[41] LORENTE, Jesús-Pedro. The development of museum studies in universities: from technical training to critical museology. In: *Museum Management and Curatorship*, vol. 3, 2012, 27, pp. 238–239.

[42] "Ecole du Louvre, historie", accessed 31 March 2019, http://www.ecoledulouvre.fr/ecole-louvre/histoire.

1909[43]. Almost at the same time, American museums began to hold curatorial courses[44] and anthropologist Roland B. Dixon recognized museology as the term adequate for "a mere description and classification of ancient remains left by past ages".[45] After the Great War, George Sarton (one of the originators of the field of history of science), in his preliminarily introduction to the history and philosophy of science, placed museology in a group of educational sciences whose goal is to methodically impart and diffuse knowledge.[46] At the same time, at Masaryk University in Brno, museology lectures led by Jaroslav Helfert were initiated in 1921[47], while at Harvard University, the art historian Prof. Paul J. Sachs, began to teach a course entitled Museum Work and Museum Problems.[48]

In the post WWII Cold War era, under the influence of the L'Ecole du Louvre and the museography course given by Germain Bazin, the Western world developed a particular route of "museum science", centred around the museum object and organization of museum works.[49] On the other side of the Iron Curtain, in 1963, Jan Jelinek, an anthropologist and curator of the Moravian Museum, (re)established a museology department at Masaryk University (now known as Jan E. Purkyne University). Debates about museology featured in academic discussions on both sides of the Iron Curtain.[50] At the University of Leicester (UK) in 1966, a Department of Museum Studies was founded by Raymond H. Singleton. Allegedly, the name *museum studies* was chosen instead of *museology* "because he detested the endless debates on the theory of museology which his colleagues at central and eastern European universities were engaged in", and wished to give priority to providing "practical training to graduates from *any discipline* who wished to work in a museum".[51]

The founding, in 1977, of ICOFOM – the International Committee for Museology within the International Council of Museums (ICOM) – created a space for geographically (and maybe ideologically) divided museologists to discuss museological topics.[52] Also in 1977, the Department of Archaeology and Museology was established in Brno, and in the mid-nineties the museology became a special section within this department. Alongside its regular university

[43] The invitation to this event read: "The first International Congress of Entomology will be held on August 1-16, 1910, at Brussels, during the International Exposition, which will be taking place there at that time. The subjects to be brought before the general or sectional meetings will comprise systematics, nomenclature, anatomy, physiology, psychology, ontogeny, phylogeny, ecology, mimicry, etiology, bionomy, paleontology, zoo geography, museology, medical and economic entomology". In *Science*, New Series, 30(769), 24 September 1909, p. 404.

[44] LORENTE, The development of museum studies in universities…, p. 239.

[45] "If archeology is more than a mere description and classification of ancient remains left by past ages (and this could assuredly be only its technical foundation, which may be described under the term 'museology')…". DIXON, Some Aspects of North American Archeology…, p. 573.

[46] SARTON, Introduction to the History…, p. 29.

[47] DOLÁK, Jan. Czech and Slovak museology, current status and the future of this branch of science. In: *Nordisk Museologi*, 2007, 2, pp. 99–186.

[48] DUNCAN, Sally Anne and Andrew MCCLELLAN. *The Art of Curating: Paul J. Sachs and the Museum Course at Harvard*. Los Angeles: Getty Research Institute, 2018.

[49] BAZIN, Germain. *Museologie: cours de Mr Germain Bazin*. Paris: Ecole du Louvre, 1950.

[50] These discussions are very well elaborated in GLUZINSKI, Wojciech. *U podstaw muzeologii*. Warszawa: PWN, 1980. See also, STRÁNSKÝ, Pojam muzeologije…, pp. 17–28. There is a valuable overview of Russian and Soviet museological experience in ŠULEPOVA, Èleonora Aleksandrovna (ed.) *Muzeevedčeskaja mysl' v Rossii XVIII—XX vekov: Sbornik dokumentov i materialov* [Museological Thought in Russia eighteenth–twentieth centuries. Proceedings of Documents and Materials]. Moskva: Èterna, 2010. [In Russian]

[51] LORENTE, The development of museum studies in universities, p. 240.

[52] In this regard, it is worth noting the importance of the professional associations and journals that preceded the ICOM. Cf. STRÁNSKÝ, Pojam muzeologije…, pp. 7–8.

courses, the school in Brno became known for organising museological seminars, which in 1986/87, with the support of UNESCO, grew to become the International Summer School of Museology.[53] In same period, after the spark lighted during the seventies, "new museology" erupted onto the scene. This ranged from (in its significant form) the well-founded conjunction of the Brno School and George-Henri Rivière concepts, to more liberal (and even frivolous) interpretations of museum policies.[54] From there, the contemporary concept of museum studies was developed as a "cross-disciplinary dialogue about museums".[55]

The last two decades of the twentieth century brought further changes to museological world, with two great "explosions" – a *museum* and a *memory* boom, which brought to the fore questions of identity and heritage, and, from there, the relation of modern man with his past. Museology had something to say about this, so one of the specific results of these movements (sprung from previously tilled soil) was the founding of numerous university seminars on museology or museum studies at the global level, as well as the expansion of professional and academic journals and other literature.[56] Thus, by 1997, the Croatian Professor of Museology, Ivo Maroević, could observe that "Today, museology is an academic discipline with regular university graduate study programmes in many counties.... This is a great difference in comparison with position of museology some twenty years ago".[57]

It was through this route that, twenty years later, we could arrive at the five contemporary definitions of museology stated earlier, which testify more to the rich variety of approaches than to the unique object of research.[58]

Conclusion: The name of the Muses

Even in the recent past, the idea of museology as a scientific discipline was considered to be something of a "Continental eccentricity".[59] There is a famous statement, often attributed to Richard Feynman, that the philosophy of science is about as useful to scientists as ornithology is to birds. As we might observe, birds do not receive much benefit from ornithology, nor from physics, nor from any other science or philosophy. The only one who benefits is man. Similarly, it could be said that museums have reaped as many benefits from contemporary museology as birds have from ornithology. But here, at the end of paper, it seems that we have forgotten an important "beginning".

Museology owes its name, as do museum and music, to the daughters of Power (Zeus) and Memory (Mnemosyne) – that is, to the Muses. But, how did the Muses get their name? As one famous encyclopaedia teaches us: "They are said to be called Muses, from a Greek word meaning to explain mysteries, Μύειν, because they taught men very curious and important things

[53] STRÁNSKÝ, Zbyněk. The Department of Museology, Faculty of Arts, Masaryk University of Brno and the questions of defining a profile of the museology curriculum. In: *ICOFOM Study Series*, 1993, 22, p.127.

[54] Regarding the popularity of inventions of "new" in traditional disciplines, see BURKE, Peter. *What is Cultural History?* Cambridge: Polity, 2008, pp. 77–101.

[55] MACDONALD, Sharon. Expanding Museum Studies: An Introduction. In: MACDONALD, Sharon (ed.) *A Companion to Museum Studies*. Malden, MA – Oxford: Blackwell Publishing, 2006, p. 1.

[56] Cf. LORENTE, The development of museum studies in universities…, pp. 237–252.

[57] MAROEVIĆ, Ivo. Museology in the Future World. In: STRÁNSKÝ, Zbyněk (ed.) *Proceedings of the international symposium "Museology for Tomorrow's world"*. Munich: Verlag Dr. Christian Mueller-Straten, 1997, p. 21.

[58] DESVALLÉES and MAIRESSE, Key Concepts of Museology…, pp. 53–56. See also STARN, Randolph. A Historian's Brief Guide to New Museum Studies. In: *The American Historical Review*, 2005, 110, 1, pp. 68–98.

[59] SOFKA, Vinoš. *My adventurous life with ICOFOM, museology, museologists and anti-museologists, giving special reference to ICOFOM Study Series*. Paris: ICOFOM, 1995, p. 8.

that are beyond the reach of the vulgar".[60] Through the various "beginnings" of museology we explored, can we take this idea – the need for a non-vulgar articulation of the world – as a conclusion? We have seen how museology changed and how it dodged various academic frames and classifications. We talked about museology as knowledge about the systematization of collections, as the art of museum organization, and as the theorisation of the relationship between man and his reality. In the years since the term was first coined, scientific paradigms changed, "revolutionary" sciences became traditional, and academic knowledge became an instrument of liberation, then an ideology, then merchandise. And for all that time, museology was often perceived as a discipline that was only just beginning.

Having all this in mind, it could be argued in the end that throughout its history, the idea of museology has more or less successfully managed to avoid vulgar traps of scientism. Instead, within the comprehensive corpus of science and its heritage, museology remains a provoking and elusive discipline that constantly reinvents its own beginnings.

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[60] LOUIS, chevalier de Jaucourt. Muses. In: *The Encyclopedia of Diderot & d'Alembert Collaborative Translation Project*. Translated by Emily K. Wu. Ann Arbor: Michigan Publishing, University of Michigan Library, 2015. Accessed 31 March 2019, http://hdl.handle.net/2027/spo.did2222.0002.871. Trans. of "Muses", *Encyclopédie ou Dictionnaire raisonné des sciences, des arts et des métiers*, vol. 10. Paris, 1765.

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Museum education in the context of socio-cultural changes in the countries of Eastern Europe (using the examples of Poland, Ukraine and Russia)

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Museum education in the context of socio-cultural changes in the countries of Eastern Europe (using the examples of Poland, Ukraine and Russia)
The subject of the research presented here is the language and content of the definitional terms, categories and concepts relating to museum education in the historiography of the topic. The article is a review that provides an analysis of selected papers on museum education, surveying the categories, terminology and definitions proposed by Polish, Ukrainian and Russian researchers. The study also involved looking at museum websites to review the descriptive terms, concepts and categories used in the sections relating to the museums' educational activities. Finally, against this background the authors present their own approaches and definitions relating to museum education. The work is partly a result of the experience of the authors' own common educational practice and investigations. The cultural contexts of museum education are significant and influential in the quality of the services provided in each of the surveyed countries and museums. The generalisations presented are appropriate to the specific contexts of the research reports and educational projects quoted.

Keywords: Museum Education, Museum Pedagogy, School and Museum, Cultural Education, Cultural Heritage

Today, museums have become involved in educational and socio-cultural activities throughout most of the world. Having changed considerably over recent decades, the current paradigm of museum education has not only entered the mainstream educational domain but is also increasingly reflected in the work of cultural institutions. These are now open to the challenges of democratisation processes in culture, which is to be available to all citizens—children and teenagers, adults and the elderly—including those who are taking their first steps in museum education in addition to the well-educated.

Similarly to schools, the educational culture in museums has been changing dynamically, evolving to meet the new socio-cultural challenges.[1] The activities presented and discussed in the Polish, Russian and Ukrainian literatures reflect the transformations taking place in the world of culture and language, social sciences and the humanities. The Western European museum boom of the 1980s and 1990s has now reached Eastern Europe. In Poland, the dynamic growth of museum education and museology owes its foundations to the bottom-up social movement of the group of museum educators who initiated the Museum Educators' Forum (Forum Edukatorów Muzealnych) in 2006. Studies on the state of museum education in Poland, carried out by the Forum in 2009–10, along with the innovative practices initiated by museum educators, produced an impulse for change and prompted a period of intense discussion in the community of educators, academic researchers and other people socially involved in the development of the museum's educational function.[2] These changes were mostly possible due to these circles' close cooperation with the National Institute for Museums and Public Collections [Narodowy Instytut Muzealnictwa i Ochrony Zbiorów], founded in 2011. Gradually their work, which was focused on the organisation of conferences, education, the introduction of practical solutions, scientific research and publications, and the dissemination of knowledge about museum education research, contributed to the transformation of the Polish museum scene at the beginning of the twenty-first century.

In Poland, research on the educational function of museums had been conducted since the late 1960s within the humanist paradigm. Museums were presented as places responsible for cultivating remembrance and patriotic attitudes, transmitting cultural values and providing aesthetic education through art and in response to it (T. Gołaszewski, I. Wojnar, L. Turos).[3]

In Polish publications the category of "museum education" includes issues relating to museology, which is currently facing new challenges associated with new technologies and global socio-cultural transformations. In the twenty-first century, the term "museum" is undergoing a transformation, and increasingly means a place of life-long education, sociological reflection and exchange of socio-ideological thinking. As the Polish researcher D. Folga-Januszewska observes, the third wave of musealisation has come in response to the changing forms of communication observed in the past two decades.[4]

The term "museum education" is often used interchangeably with the concepts of "museum pedagogy" or "museological pedagogy". In a way, these terms, concepts and categories reflect the diversity of content when it comes to museum collections in relation to museum buildings and their arrangements as well as conservation, security and insurance, display and popularisation methods. However, what is of particular interest in museum education is the use of methods of communication that establish direct contact with visitors to the institution, expressed through the museum's offer. The terms that are used most frequently to describe the cultural and educational work of the Polish museums are "communication" or "mediation"

[1] BRUNER, Jerome. *Kultura edukacji.* Kraków: Universitas, 2006, pp. 119–121.

[2] SZELĄG, Marcin (ed.). *Edukacja muzealna w Polsce. Sytuacja kontekst, perspektywy rozwoju. Raport o stanie edukacji muzealnej w Polsce*, Warszawa: Narodowy Instytut Muzealnictwa i Ochrony Zbiorów, Muzeum Pałac w Wilanowie, 2012, pp. 11–14.

[3] TUROS, Lucjan. *Muzeum swoista instytucja edukacyjna*, Warszawa: Ypsylon, 1999, p. 216; WOJNAR, Irena. *Muzeum czyli trwanie obecności,* Warszawa: Wydawnictwa Szkolne i Pedagogiczne, 1991, p.139; GOŁASZEWSKI, Tadeusz. *Dziecko w muzeum: funkcje muzeum w wychowaniu estetycznym dziecka*. Kraków: Nasza Księgarnia, 1967, pp. 95; ZIEMBIŃSKI, Janusz (ed.). *Materiały Muzeum Zamkowego w Pszczynie VIII*. Pszczyna: Państwowe Muzeum Zamkowe, 1994.

[4] FOLGA-JANUSZEWSKA, Dorota. *Muzeum: fenomeny i problemy*, Kraków: Wydawnictwo Universitas, 2015, pp. 7–8.

(M. Szeląg, J. Byszewski, J. Skutnik, L. Karczewski, R. Pater, U. Wróblewska).[5] Some museum education researchers, who are responsible for the creation of the content offered by a museum, depart from the concepts relating to education and didactic methods, and instead focus on the museum's cultural environment, its surroundings and processes linked to socialisation and social acculturation (J. Byszewski, L. Karczewski). They cast the museum in the role of a cultural centre—a shared space for activating social groups or individuals interested in seeking to consolidate and enhance their sense of identity, self-creation, and a creative approach to their environment. These researchers point to the critical paradigm in museum communication, suggesting activities directed at addressing difficult and sensitive themes, critical discourse, and speaking up on important social and cultural issues.[6] Museum spaces, with their interactive exhibitions, serve the purpose of discovering cultural heritage, understanding the past and the socio-historical tissue of the local community, or learning about regional or global history.[7]

In Poland, museum education has developed dynamically in the last decade, largely transforming museums into places that are accessible to all. By linking the paradigm of openness with the viewers' growing involvement in interaction with the museum, many institutions develop within the participatory paradigm. The discussion on the educational function of museums in Poland is moving in the direction of integrating pedagogical and didactic functions with communication and museum mediation in creating the institution, the message it sends out, its narrative, and its cooperation with its immediate environment. The museum's educational function in its transnational aspect has also grown significantly, as is reflected in the promotion of the values of museum collections through translation projects, didactic methods, communication and language in the intercultural environment of tourism, and the internet. Museum exhibitions fuel the educational influence of the museum; their impact on social reception is the subject of research on the museum-visiting public.[8] As a part of diagnostic research, various activities are designed to accompany museum exhibitions, and the exhibitions themselves are to a large extent intended to take into consideration the varying needs and requirements of the diverse museum public. Workshops and other projects targeting specific groups and aimed at their activation are also part of a growing trend.[9] Activities which involve museum visitors enable them to become part of the artistic process of creating exhibitions. Participatory projects which involve the public are addressed to different groups of people who are in some way excluded, such as the disabled and terminally ill, but also

[5] KARCZEWSKI, Leszek. *Nowa muzeologia i agoniczna demokracja.* In: KOSIŃSKA, Marta, SIKORSKA, Karolina, SKÓRZYŃSKA, Agata (ed.). *Edukacja kulturalna jako projekt publiczny*, Poznań: Galeria Miejska Arsenał, 2012, pp. 91–106; RADŁOWSKA, Karolina, WRÓBLEWSKA, Urszula (ed.). *Edukacja muzealna—konteksty teoretyczne i praktyczne*, Białystok: Muzeum Podlaskie w Białymstoku, Uniwersytet w Białymstoku, 2013; PATER, Renata. *Edukacja muzealna—muzea dla dzieci i młodzieży.* Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego, 2016, pp. 40–41; BYSZEWSKI, Janusz, *Muzeum w drodze 2012*: http://123902-muzeum-w-drodze-www.platformakultury.pl/index.php?module=article&id (Accessed 12 February 2019).

[6] PIOTROWSKI, Piotr, *Muzeum krytyczne*, Poznań: Dom Wydawniczy Rebis, 2011, p. 9.

[7] LEHRER, Erica. *Polska i Polin. Pedagogika publiczna a muzea transnarodowe i transkulturowe.* In: BANAŚ, Anna, CHODACZ, Weronika, JANUS, Aleksandra (eds.). *Laboratorium muzeum. Tożsamość.* Warszawa: Dom Spotkań z Historią, 2018, p. 68–94; BYSZEWSKI, Janusz. *Muzeum jako rzeźba społeczna.* In: KOSCHANY, Rafał, SKÓRZYŃSKA, Agata (eds.). *Edukacja kulturowa. Podręcznik*. Poznań: Galeria Sztuki Arsenał, 2014, pp. 39–49.

[8] BUCHNER, Anna. *Badania publiczności. Zrób to sam*. In: BANAŚ, Anna, CHODACZ, Weronika, JANUS, Aleksandra (ed.). Laboratorium muzeum…, pp. 132–144.

[9] PATER, Renata. Research, educational and publishing activities of museums in Poland. In: *Museums in Poland: reports based on data from the museum statistics project (2013–2015)*, Warsaw: National Institute for Museums and Public Collections, 2017, pp. 13–28.

the elderly or children.[10] Active cooperation between schools and museums is expressed in numerous courses and forms of training aimed at teachers. The themes of museum lessons take into consideration the subject areas present in the new national curriculum at every stage of school education. The virtual presentations of museums include an "education" tab, presenting activities and programmes designed for the museum public of all ages, often in response to the needs of local communities.[11]

Generally speaking, the current discourse of museum education in Poland is directed at a critical approach to museum initiatives, constructing high-quality, high-value offers which will open museums to a new public, enabling the activation and involvement of different target groups, such as families with children, nursery, primary and secondary school children, students, adults, the elderly, terminally ill people, the disabled, and people who have various dysfunctions or are socially excluded (e.g. prisoners, the mentally ill, and the unemployed). Museum education discourse incorporates the influences of global trends emanating from North and South America but also from Western Europe, where museum-visiting individuals and communities are placed right at the centre of the institutional focus. Museum collections and resources are designed to directly serve the interest of the society, education, social inclusion and cultural socialisation by introducing narratives to museum exhibitions, along with other forms of social communication and mediation.[12] Museum exhibitions have varying influences as their constructivist approach assumes multiple, subjective interpretations and readings.[13] In this way, museums redefine their activities in respect of their social mission, acting as a form of media among numerous other multimedia points of contact. They require self-reflection and a redefinition of the relationship between information and experience, knowledge and emotions, objects and stories, in a spirit close the theatre-inspired approach to the museum experience (B. Kirshenblatt-Gimblett).[14]

A definitional review of museum education authored by Polish researchers presents the museum in the context of the evolution of concepts: from the institution's Enlightenment character to its gradual opening to the class-diverse society. This openness changes in the context of socio-cultural and civilizational transformations and is nowadays defined by the term "social participation" in the paradigm of a participatory and critical museum. Museum education is a kind of bridge connecting the artist with the recipient, the past with the present, as well as a cultural institution and its guests.[15]

The "new museum", as the category introduced by researchers in analogy to the concept of "new museology" has it, opens its doors to the entities operating within the local environment, including schools and universities, by introducing dialogue and cooperation between

[10] KARCZEWSKI, Leszek. Sztuka czy zupa. Społeczna odpowiedzialność edukacji muzealnej. In: *Muzealnictwo*, Warszawa: Narodowy Instytut Muzealnictwa i Ochrony Zbiorów, No. 56, 2015, p.164.

[11] GŁOWACZ, Aleksandra. Między Oświeceniową misją muzeum a innowacyjną ofertą edukacyjną. In: *Muzealnictwo*, nr. 51. Warszawa: Krajowy Ośrodek Badań i Dokumentacji Zabytków, 2010, pp. 87–96.

[12] SZELĄG, Marcin, SKUTNIK, Jolanta (ed.). *Edukacja muzealna. Antologia tłumaczeń*. Poznań: Muzeum Narodowe w Poznaniu, 2010, pp. 7–57.

[13] WYSOK Wiesław, STĘPNIK, Andrzej. *Edukacja muzealna w Polsce. Aspekty, konspekty, ujęcia*. Lublin: Państwowe Muzeum na Majdanku, 2013, p. 175.

[14] KIRSHENBLATT-GIMBLETT, Barbara. Muzeum jako katalizator. In: *Laboratorium muzeum*... pp. 36–37.

[15] PATER, Renata. Edukacja muzealna—wychowanie do aktywnego uczestnictwa w kulturze. In: *Parezja*, vol. 7, 2017, No. 1, Warszawa: Forum Młodych Pedagogów przy Komitecie Nauk Pedagogicznych PAN, pp. 74–92; The National Museum in Krakow defines education as a bridge connecting the past with the future: http://mnk.pl/edukacja-w-mnk (accessed 10 February 2019).

communities. In this respect, the widespread process of aesthetic education goes beyond the museum walls and involves the city environment with its many educational and cultural institutions (e.g. archives, libraries, and theatres).[16]

When addressing the issue of aesthetics as a subjective attribute of education and considering the functions of art in the context of transgression and acculturation, the Polish researcher of aesthetic education, M. Zalewska-Pawlak, considers aesthetics to be the property that autonomises and consolidates the subjectivity of a human being.[17] In reality, aesthetic education at school is increasingly carried out in cooperation with a museum, which is increasingly an institution that initiates innovative practices in this area.[18] The pedagogical literature mentions the concepts defining educational contexts in the man–art relationship, which determine the basic research areas: aesthetic, cultural and artistic education. Zalewska-Pawlak notes that concepts in artistic, cultural and aesthetic education are dynamically crossing and creating systems of mutual interpenetration, with the tendency to eventually separate and identify each concept. Hence museums and art galleries become increasingly significant in contemporary aesthetic, artistic and cultural education.[19] In these different contexts, the dialogical character of exhibitions and educational activities in the museum opens perspectives for diverse perceptions in this generational change, making each voice legitimate in the individual understanding and critical view of art.[20]

The democratic understanding of educational activities in the museum leads us to examine it from the perspective of open education for everyone who can find the time and space for it; not only the younger generation within its school education, but also adults and older people, as well as the socially excluded, in the context of life-long learning and spending time in an aesthetically and intellectually stimulating and engaging way.[21] As L. Karczewski emphasises,

Having a visitor in the museum becomes an opportunity to listen carefully to his opinion on the museum and art. It means, however, that the visitor acknowledges the value of the museum and art as such; this is not the same as admiration for a specific exhibition or work of art. Even a critical opinion must be heard: a possibility must be created for its utterance. This is a basic condition of socially responsible museum education.[22]

New trends influence the defining of museum culture while at the same time also have significance for the future shape of museum education.[23]

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[16] ZALEWSKA-PAWLAK, Mirosława. *Sztuka i wychowanie w XXI wieku*. Łódź: Uniwersytet Łódzki, 2017, p. 137.
[17] ZALEWSKA-PAWLAK, Mirosława. *Sztuka i wychowanie*..., pp. 151–195.
[18] SKUTNIK, Jolanta. *Muzeum sztuki współczesnej jako przestrzeń edukacji*. Katowice: Uniwersytet Śląski, 2008, pp. 192.
[19] Definitions of museum education and missions by museums themselves are posted on museum websites, as well as numerous museum activities for a diverse audience: http://mnk.pl/edukacja-w-mnk; https://artmuseum.pl/pl/edukacja; http://www.wilanow-palac.pl/edukacja; http://www.cricoteka.pl/pl/category/edu/; http://www.cricoteka.pl/pl/oprowadzania-i-warsztaty-dla-grup-zorganizowanych/; https://www.mnw.art.pl/edukacja/lekcje-muzealne/; https://etnomuzeum.eu/jak-myslimy-o-muzeum (accessed 10 February 2019); https://www.muzeumkrakowa.pl/edukacja (accessed 20 May 2019).
[20] HUBARD, Olga. *Art Museum Education*. USA: Colombia University, 2015, p. 52–98.
[21] PATER Renata. „Muzeum dla każdego" jako przestrzeń edukacji i rozwoju kompetencji kluczowych w uczeniu się przez całe życie. In: KOWALSKA Agnieszka (ed.). *Muzeum w świetle reflektorów. Wystawa—naukowe laboratorium czy artystyczna kreacja?* Kraków: Muzeum Historyczne Miasta Krakowa, 2012, p. 128.
[22] KARCZEWSKI, Leszek. Ankieta krytyczna 2013, czyli partycypacja w Noc Muzeów. In: KOSZANY, Rafał, SKÓRZYŃSKA, Agata (ed.). *Edukacja kulturowa. Podręcznik*. Poznań: Centrum Kultury Zamek, 2014, p.131.
[23] SAPANZHA, Olga. Museums in the new model of culture: concerning the issue of training professionals in museum education. In: *Museologia a kulturne dedicstvo, vol. 6,* 2018, No.1, pp.7–20.

The proliferation of new approaches to education contributes to the changes in teaching methods of the disciplines related to the various aspects of organised learning in the museum space. Accordingly, it is necessary to conduct comparative analyses and characterisations of scientific terms, concepts and categories related to museum education, pedagogy and communication. Most of the Russian and Ukrainian researchers (T. Belofastova, L. Vanyushkina, O. Klassova, E. Mastenitsa, Yu. Pavlenko, I. Petrova, O. Sapanzha, B. Stolyarov, L. Timofeyeva, L. Shlyakhtina, E. Shcherbakova, M. Yukhnevich, et al.) consider the museum's educational function in the interaction of two spheres of activity, thinking of it in terms of cultural and educational work (the theoretical aspect) and museum pedagogy (the practical aspect).

The category of "education" stands not only for a process, system or result but also for the value which is unique and distinctive to each person. In fact, there have been some changes in the contemporary systems of pedagogical knowledge as far as the understanding of education is concerned. This is mostly a result of the gradual fading of the "school monopoly" on knowledge, and the growing popularity of the idea of non-formal and informal education as well as the development of self-educating skills with elements of critical thinking.

As observed by S. Klepko, "education is, more than any other social structure, the desire for the existence of values … and its values may set an example for the society at large".[24] All this is consistent with the activities of museums which "manage the collection of museum objects, and organise events dedicated to a wide range of visitors".[25]

The authors of this review believe that museums should not only be transformed into educational institutions, which makes them similar to schools (school museums are another issue altogether), but that they should also carry out independent, experimental investigations into cultural and educational activities, and apply the new basic principles of working with visitors.

In relation to this, it is important to refer to the category of "museum pedagogy". V. Krayevsky, a well-known Russian researcher, opposes the destruction of the methodological framework of pedagogy, and its fragmentation into highly specialised fields, including museum pedagogy.[26]

According to the Austrian researcher F. Wajdacher, the term "museum pedagogy" often provokes misunderstandings because some "incompetent people" confuse completely different and opposing structures, i.e. the museum and the school, whereas educational activities in the museum cannot replace the school's educational tasks.[27]

According to a Slovak researcher, A. Gregorova, museum pedagogy cannot be treated as "museum work" as such, but more as an element of the cultural, educational and socio-psychological work undertaken in museums.[28] In this approach, the museum's cultural and educational activity is understood as "one of the main directions of the museum's activities, which realises its educational function, based on the theoretical foundations of museum

[24] KLEPKO, Serhij. *Modernizacijni procesi v suchasnij osviti.* Kiev: Shkil'nij svit 2008, p. 55. [In Ukrainian].
[25] AARTS, Gert, MAZURYK, Zenoviy (ed.). *Muzej: menedzhment i osvitnya diyal'nist' [Museum: management and educational activities]*. L'viv: Litopis 2009, p. 16. [In Ukrainian].
[26] KRAEVSKIJ, Volodar. Problemy ideologii v issledovanii obrazovaniya. [Ideology problems in education research]. In: *Ideologicheskie aspekty metodologicheskogo obespecheniya nauchnyh issledovanij: materialy V serossijskogo metodologicheskogo seminara, nauch. red. E.V. Berezhnova; sost. N.V. Malkova.* Moskva: MGUP 2010, p. 21. [In Russian].
[27] VAJDAHER, Frideich. *Zagal'na muzeologiya [General museology]: Posibnik, perekl.* L'viv: Litopis 2005, p. 183. [In Ukrainian].
[28] GREGOROVA, Anna. *Múzeá a múzejnictvo.* Martin: MS, 1984, p. 180–194. [In Slovak].

communication and museum pedagogy".[29]

These views stem from an understanding of the museum's work with the public that is derived from a perspective on education which is about giving shape to a system of humanistic values, interpersonal skills, museum culture, and respect for others; an understanding of the museum as the centre of patriotic education.

In the 1970s and 1980s, some of the Russian and Ukrainian researchers interpreted museum pedagogy as "a neighbouring scientific discipline which explores the forms of museum communication, the character of the use of museum tools in the transmission and perception of information from the point of view of pedagogy".[30] In the 1990s, and at the beginning of the twenty-first century, it was thought to be "the science of education with the aid of the museum",[31] "mediations which ensure the links between museums, their collections and visitors", "the scheme of educational activities in the museum; the scientific and practical activity which will develop into an integrative, interdisciplinary field of knowledge in interaction with such disciplines as pedagogy, psychology, sociology, and cultural studies",[32] "the area of scientific and practical activity of the contemporary museum, focusing on the transfer of cultural (artistic) experiences through the pedagogical process, in the museum environment",[33] an "integrated scientific discipline, which discovers the educational aspects of museum communication and methodically provides for the cultural and educational activities of the museum",[34] and "a scientific discipline at the interface of museology and pedagogical sciences, which deals with researching the educational aims of the society in the field of specific forms of museum communication, and considers the museum as an educational system".[35]

According to the Russian researcher T. Mysheva, contemporary museum pedagogy should be perceived in the context of the dialogue between cultures in three aspects: the cognitive, creative, and social, which requires a more effective use of cultural heritage.[36]

Contemporary research defines museum pedagogy as a "set of scientific concepts and principles that define the meaning and strategies of museum education and the methodological basis for the implementation of educational activities in the museum",[37] "a combination of

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[29] SLOVAR' aktual'nyh muzejnyh terminov [Dictionary of current museum terms]. Avtor.-sost. M. Kaulen, A. Sundieva, I. Chuvilova, O. Cherkaeva, M. Borisova i dr. In: *Muzej*, 2009, 5, p. 54. [In Russian].

[30] LEVYKIN, Konstantin, HERBST, Vilhelm (ed.). *Muzeevedenie. Muzei istoricheskogo profilya [Museology:Museums Historical Profile]:* Ucheb. posobie dlya vuzov po spec. "Istoriya". Moskva: Nauka, 1988, p. 272. [In Russian].

[31] MYSHEVA, Tatiana. *Muzejnaya pedagogika v sovremennom sociokul'turnom obrazovatel'nom kontekste [Museum pedagogy in a modern sociocultural educational context], Pod. red. N. P. Ryzhih*. Taganrog: Izd-vo Taganrogskogo gos. ped. in-ta, 2008, pp. 148–149. [In Russian].

[32] MASTENICA, Elena, SHLYAHTINA, Liudmila. Problemnoe pole muzejnoj pedagogiki: ponyatie, sushchnost', vektory sovremennogo razvitiya. [The problem field of museum pedagogy: concept, essence, vectors of modern development]. In: *Gercenovskie chteniya 2005. Aktual'nye problemy social'nyh nauk. Sb. nauchnyh i nauchno-metodicheskih trudov*. Sankt-Peterburg: RGPU im. A.I. Gercena, 2005, pp. 405–411. [In Russian].

[33] STOLYAROV, Boris. *Muzejnaya pedagogika, istoriya, teoriya, praktika. [Museum pedagogy: history, theory, practice]*. Moskva: Vysshaya shkola, 2004, p. 105. [In Russian].

[34] SLOVAR'…, p. 59.

[35] YUHNEVICH, Marina. *Ya povedu tebya v muzej: ucheb. posobie po muzejnoj pedagogike. [I will lead you to the museum: a manual on museum pedagogy],* Moskva, 2001, p. 3. [In Russian].

[36] MYSHEVA, Muzejnaya pedagogika..., p. 148.

[37] SAPANZHA, Olga. Muzejnoe obrazovanie i muzejnaya pedagogika v Rossijskoj akademicheskoj tradicii i praktike muzejnogo dela: granicy ispol'zovaniya ponyatij i ih soderzhanie [Museum education and museum pedagogy in the Russian academic tradition and museum practice: the boundaries of the use of concepts and their content]. In: *Obshchestvo: sociologiya, pedagogika, psihologiya. Nauchnyj zhurnal,* 2017, 1, pp. 75–78. [In Russian].

practical cultural and educational activities of the museum", "the betterment of the research methodology of the museum's educational function and scientific research on the principles of the museum's communication policy"[38], and "museum presentation as the presentation of the collection of resources in the museum exhibition with the use of theatricalisation, games, quests, interactive trips in order to achieve emotional and psychological immersion, participation and empathy among the visitors" [39].

The category of "museum education", synonymous with that of "museum pedagogy" (the museum's educational activity), is defined as a collective term: a pedagogically organised process of interpretation and explanation of the historic and cultural potential of museum resources; education through culture[40]; museum education/activities in the museum—development of personal life-experience based on museum communication[41]; and pedagogy of museum work—the museum as the universal model of the world, acquiring the rights of the essence of culture and ways of individual existence in culture, taking advantage of the cognitive methods appropriate for the museum in its didactic, research and educational activities.[42]

In this context, it is important to consider the concept defining "the museum (educational) environment as a factor that creates a specific kind of museum and educational system, as the system of key factors which determine human growth and development".[43] This approach is linked with "museum communication"—museum activities which are a type of social communication associated with transmitting significant information with the use of particular museum forms and transmission channels (museum object, the museum space in various forms—permanent and temporary exhibitions, other forms of organised space, specially organised ways of updating information, etc.)[44].

Researchers also mention the terms "museum space"—considered synonymous with the exhibition space being the main form of presenting cultural heritage in the museum, with its own changeable configuration and dynamics[45]—and "museum teaching styles". The perception and interpretation of information in the museum and the response to it measured by the methodology of collecting, evaluating and using information is also considered to be an important part of research.

The authors of this paper accept that it is important to return to the terms "museum didactics" (in a broader sense, as the museum's mediation mission, and educational museum methodology), and "cultural practices in the museum" (applying the activities that support the

[38] TIMOFEEVA, Liudmila. Muzejnaya pedagogika ili pedagogika muzeya: formirovanie ponyatijno-kategorial'nogo apparata. [Museum pedagogy or museum education: the formation of the conceptual categorical apparatus]. In: *Filologiya i kul'tura,* vol. 28, 2012, 2, pp. 287–291. [In Russian].

[39] BORISOV, Yurij. Chemu uchit muzej, ili chto takoe muzejnaya pedagogika. [What is a museum, or what does museum pedagogy teach]. In: *Pedagogika,* 2018, 1, p. 67. [In Russian].

[40] MASTENICA, Shlyahtina, Problemnoe pole..., pp. 405–409.

[41] SAPANZHA, Muzejnoe obrazovanie..., pp. 75–78.

[42] VANYUSHKINA, Liubov, KOROBKOVA, Elena. Pedagogika muzejnoj deyatel'nosti [Pedagogy of museum activities]. In: *Iskusstvo. Pril. k gaz. 1 sentyabrya,* 2007, 24, pp. 2–7. [In Russian].

[43] KARAMANOV, Aleksey. Multikulturnyj diskurs muzejnogo obrazovaniya: problemy i perspektivy razvitiya. [Multicultural discourse of museum education: problems and development prospects]. In: *Kul'turnoe mnogoobrazie: ot proshlogo k budushchemu. Teksty uchastnikov V torogo Rossijskogo kul'turologicheskogo kongressa s mezhdunarodnym uchastiem (Sankt-Peterburg, 25–29 noyabrya 2008),* Sankt-Peterburg: EHjdos 2010, pp. 2381–2390. [In Russian].

[44] SAPANZHA, Muzejnoe obrazovanie…, pp. 75–78.

[45] MASTENICA, Elena. Muzejnoe prostranstvo kak kul'turologicheskaya kategoriya. [Museum space as a cultural category]. In: *Tretij Rossijskij kul'turologicheskij kongress s mezhdunarodnym uchastiem «Kreativnost' v prostranstve tradicii i innovacii»*. Sankt-Peterburg: EHJDOS 2010, p. 217. [In Russian].

museum's effective functioning in and for the society, which define and stimulate the creative search for innovative types of museum work so as to ensure the long-term dynamics of their development).[46] What is also relevant is "the language of the exposition" (museum language) as a particular type of socio-cultural information, instrument of knowledge and regulator of behaviour; the carrier of the particular type of socio-cultural information conveyed in the museum space, consisting of signs (museum objects) and language (exposition).[47]

The most important specific feature of museum language, distinguishing it from the languages of other socio-cultural information systems, is its particular and truly "object-oriented" nature, which allows for the transmission and functioning of information about objects in the cultural and historical space through the representations of objects or their real fragments, to ensure their full sensual perception.[48]

Among the mechanisms of the latest research in this field are the interpretation of the following terms: "interactivity in the museum", which contributes to the consolidation of the visitors' role through various modellings of their activities, organisation of different forms of co-creation, and realisation of the potential inherent in the development of aesthetic personality[49]; "mediation in the museum" (mediation, art-mediation), which provides for the communication of the objects of cultural heritage in reference to the present moment, and means that objects are introduced in the real context, both social and personal (e.g. an art mediator encourages visitors to present their own interpretations, linking the museum's works to the context of their personal lives)[50]; and "multiculturalism in the museum", which intensifies the process of the perception of exhibits in the context of the dialogue between cultures, breaking through stereotypes and prejudice. This perception is based on the reconstruction of some of the past through the prism of the history of individual objects, the reconstruction of event lines, the interpretation of facts, the analysis of life-stages, and the work of a particular person.[51] "Inclusive education in the museum", as a tool of social transformation for people with special needs (e.g. the disabled), stands for an accessible museum environment, creating special programmes, applications of universal design rules or attracting volunteers.[52] We also

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[46] SHCHERBAKOVA, Elena. Sovremennye kul'turnye praktiki: obrazovatel'nyj i razvivayushchij koncept muzejnogo prostranstva [Modern cultural practices: educational and developing the concept of the museum space]. In: *Pedagogika i psihologiya obrazovaniya*, 2014, 3, pp. 31–36. [In Russian].

[47] NIKISHIN Nikolay. «Jazyk muzeja» kak universal'naja modelirujushhaja sistema muzejnoj dejatel'nosti [«Museum language» as a universal modeling system of museum activity]. In: *Muzeevedenie. Problemy kul'turnoj kommunikacii v muzejnoj dejatel'nosti*, otv. red. V. Ju. Dukel'skij. Moskva: Nauchno-issledovatel'skij in-t kul'tury 1988, pp. 7–15. [In Russian].

[48] PSHENICHNAYA, Svetlana. *Muzej kak sociokul'turnyj fenomen. Informacionno-kommunikativnaya model': Monografiya [Museum as a sociocultural phenomenon. Information and Communication Model: Monograph]*, Sankt-Peterburg: Obrazovanie, 1999, pp. 142–160. [In Russian].

[49] MAKAROV, Dmitriy, EGUNOVA, Olga. Interaktivnye tehnologii v rabote sovremennogo muzeja i ih vlijanie na kul'turu i obrazovanie. [Interactive technologies in the modern museum and its impact on culture and education]. In: *Vlast',* 2013, 5, pp. 56–58. [In Russian].

[50] IZMAJLOVA, Anna, KOLOKOL'CEVA, Maria. Art-mediaciya v deyatel'nosti hudozhestvennyh muzeev. [Art mediation in the activities of art museums]. In: *Molodoj uchenyj,* 2016, 14, pp. 292–294. [In Russian].

[51] KARAMANOV, Aleksey. Muzejnoe prostranstvo v kontekste idej mul'tikul'turnogo obrazovaniya. [Museum space in the context of the ideas of multicultural education]. In: *Visnik Lugans'kogo nacional'nogo pedagogichnogo universitetu im. T. Shevchenka, Pedagogichni nauki.* Lugans'k: "Al'ma-mater", 2011, 5 (216), pp. 178–186. [In Russian].

[52] DONINA, Irina. Universal'nyj dizajn v sociokul'turnoj adaptacii «osobyh» posetitelej muzejnymi sredstvami. [Universal design in the sociocultural adaptation of "special" visitors by museum means]. In: *Izvestiya Rossijskogo gosudarstvennogo pedagogicheskogo universiteta imeni A. I. Gercena.* Sankt-Peterburg, 2014, 166, pp. 133–143. [In Russian].

have "virtualisation in the museum" as an inspiration for the use of a "Museum Web 2.0" concept; the virtualisation of history, understanding "the museum as a medium" or a centre of "creating culture", and also as a centre for creating a new reality—art realised in the digital, virtual sphere.[53]

This increased interest in museum education and museum pedagogy is the result of changes in the contemporary paradigm of education and, as a result, changes in the organisational principles of the education process, with a tendency towards dialogue and communication.

On the one hand, the traditional approach to the idea of the museum is still present in the contemporary setting, making space for traditional forms of education. On the other, new forms and methods of museum communication have appeared, focusing primarily on participation, in which the society shares actively in the creation of museum exhibitions—an expression of the culture of participation in the museum, with its space for dialogue and cooperation.

In this context, it is not difficult to motivate children and young people to visit museums as part of their understanding and acceptance of culturally-oriented education as an expression of the obvious relationship between education and culture.

Based on our study of the definitions which reflect the various aspects of the interaction between museum education and museum pedagogy, we can draw the conclusion that approaches to their interpretation are changing both retrospectively and according to contemporary perceptions. Educational reform, the adoption of the creative paradigm in education, and the humanistic nature of the teacher–pupil relationship open new perspectives for cooperation between the school and the museum through the application of contemporary pedagogical knowledge and an orientation towards self-education, dialogue, and communication.

Notably, these tendencies towards a paradigm change are progressing dynamically in the countries of Eastern Europe, including Poland, Ukraine and Russia, stemming from the exchange of scientific thought but also, above all, of educational and cultural practices applied in the local museums and education systems, which are increasingly open to innovative, creative thinking. New processes of communication and education in the museum, which are based on public trust, invite cooperation and the co-creation of the museum's message, manifested in the new forms of participatory museum.

The concepts and categories of museum education discussed in this paper are part of the challenges posed by the social education of the twenty-first century. In fact, these historical, literary and cultural contexts introduce museum education to the new dimension of man's humanistic development, to the learning of values, and to a dialogical approach to discovering identity and new values. In this context, redefining concepts, terms, and categories helps us find new meanings and understand the world and ourselves in the social and cultural dimension.

[53] For example, one can identify effective ways to use the virtual museum space. See *Communal Living in Russia*, http://kommunalka.colgate.edu/cfm/about.cfm?Open=WhatIsThisSiteAbout&KommLanguage=Russian (accessed 18 May 2019); *Muzeum Pałacu Króla Jana III w Wilanowie*, https://www.wilanow-palac.pl/ (accessed 18 May 2019); *Lvivarnya,* http://lvivarnya.com.ua/ (accessed 18 May 2019).

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AARTS, Gert. MAZURYK, Zenoviy. (eds) (2009) Muzej: menedzhment i osvitnya diyal'nist' [Museum: management and educational activities], L'viv: Litopis. [In Ukrainian].

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Museum education in semi-peripheries: social, cultural and economic aspects of the globalisation of Polish and Slovak heritage institutions[1]

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Museum education in semi-peripheries: social, cultural and economic aspects of the globalisation of Polish and Slovak heritage institutions
The paper examines the problem of change in Central-Eastern European museum education in the globalising world. The main objective is to answer the question of whether museums located in peripheral regions of semi-peripheral states introduce patterns developed in global core-states or maintain the approach invented during the former political period. Its main assumption is that globalisation is a discursive process engaging global, national and local cultural elements, leading to reshaping of local patterns.
The paper is based on 14 in-depth interviews conducted with curators working at local museums of the Subcarpathian and Košice regions, supported by four interviews carried out with museum workers of national museums in Warsaw and Bratislava.

Keywords: Globalisation, Museum Education, Peripherality, Poland, Slovakia

1. Museums and globalisation

The aim of this paper is to determine whether museums located in peripheral regions of Poland and Slovakia underwent changes in the field of museum education after the fall of communism. We would also like to answer the question of whether the ongoing process of globalisation and incorporation of both countries into the structures of the European Union and museum networks influences local museum pedagogy practices.

[1] This paper is the outcome of the research project *Rola muzeów w konstruowaniu tożsamości lokalnych w Polsce i na Słowacji* (*The role of museums in constructing local identities in Poland and Slovakia*) IA-11/2017/508, financially supported by the fund for carrying out scientific research and related tasks supporting the development of young scholars and doctoral studies participants at the University of Rzeszów Department of Sociology and History.

Studying local museums in the globalising world raises some doubts about the legitimacy of research into cultural institutions that treats them as independent entities separated from a broader context. The world of closed communities began to cease with the advent of modernity.[2] Treating organisations and communities as independent—as is done in more traditional ethnography or in case studies—is often an important strategy for defining a field of study. Yet in the case of museums, such focus might decrease the quality of collected data. Museums as the subject of social sciences should be studied with their historical background,[3] which once again moves us towards anthropological—and thus more locally oriented—methodology. The historically changing model of the institution has more to do with global processes, however. The study of museums deals with local and global patterns simultaneously. The institution reinterprets the product of the nation or region within the universalised categories of the globalisation process (psychotherapy, folklore, theatre, art).[4] Even if certain artefacts are treated as "global" heritage, they are interpreted locally.[5] On the one hand, local museums deal with geographically and culturally limited phenomena. Looking from the perspective of the state, or states united by a political system, the museology of the former communist countries developed in a certain isolation and applied a somewhat different, ideologically-based approach[6] from its Western counterpart. On the other hand, certain patterns in museum development and functioning bring the local, regional, national, and global together. Some authors, in fact, treat these institutions as factors of globalisation. Martin Prösler suggests that museums have not just followed world development, but their attachment to processes of colonialism and imperialism has helped the global spread of certain ideas such as nation and national identity, and has shaped the contemporary world.[7]

Globalisation, according to Anthony Giddens, is an intensification of worldwide social relations linking distant localities in such a way that local happenings are shaped by events occurring many thousands of miles away and vice versa.[8] It is a multidimensional process[9] and certain aspects might proceed individually. The source of the concept of globalisation lies in the spheres of economics and finance.[10] According to Immanuel Wallerstein there is a certain setup of states—core, semi-peripheral and peripheral—and a one-directional transfer of patterns from the core to the peripheries, leading to an eventual subordination of the latter to the former.[11] The domination of global brands (e.g. Coca-Cola, Google, McDonald's) even

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[8] GIDDENS, Anthony. *The consequences of modernity*. Stanford, Calif: Stanford Univ. Press, 1997, p. 64.

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[10] YOUNG, Linda. Globalisation, culture and museums: A review of theory. In: *International Journal of Heritage Studies* 5 [online], 1999, vol. 1, p. 6. DOI: 10.1080/13527259908722242

[11] WALLERSTEIN, Immanuel. *Analiza systemów-światów*. Warszawa: Wydawnictwo Akademickie Dialog, 2004.

in local markets might illustrate this idea. This is also to be perceived in certain post-communist countries' museums. The introduction of the market-driven economy to the cultural sphere (although this has been criticised) is one such example. Wallerstein's perspective defines Western countries as core states, and post-communist countries, such as Poland and Slovakia, as semi-peripheral. But this is just one point of view. Giddens' definition shows there is a kind of interplay among different actors in the globalisation process. While certain authors agree on the unequal distribution of power among the participants, they also point out the unquestioned agency of peripheral actors.[12] Exposed to the core states' influence, former communist and third world countries could take different attitudes towards novelties. In the late 1990s, Western patterns were perceived either as an opportunity, or a threat to traditional museum practices. While the symbolic transfers between East and West intensified, there was also some sort of awareness of globalisation as a factor of exploitation.[13] But globalisation is not only a transfer of patterns. It is also accompanied by the emergence of certain structures which improve this transfer. The development of transnational networks[14] such as ICOM allows the exchange of symbolic means outside of simple international or interregional cooperation.

While generally acknowledging the usefulness of Wallerstein's framework to our analysis, we reject his idea of a one-directional transfer of patterns. We therefore assume a certain degree of agency among local actors. To include this we would like to introduce Roland Robertson's cultural globalisation theory which underlines the discursive character of the process. He uses the notion of "glocalisation" to describe the process of interaction, selection and merging of patterns produced globally and locally. "Core" patterns are not just forcefully introduced into "peripheral" cultures. They might be applied to a new context only partially. Of course, the introduction of new symbolic systems might develop differently in cultures of strong and weak local identities.[15] Robertson and Giulianotti proposed four possible strategies for dealing with globalisation in a local context:[16]

- Relativisation—rejection of foreign patterns and concentration on the locality's own, traditional, values;
- Accommodation—pragmatic adaptation of less important foreign symbols and preservation of most important local symbols;
- Hybridisation—a creative combination of local and foreign patterns;
- Transformation—approval of supra-local patterns, creation of new patterns on their basis or—in extreme situations—substitution of local symbols with new ones.

Local actors do not only depend on "global" players, but also on their national-level partners. The rules of their functioning are partially shaped by national law and financed by national government (via local governments). Different relations between national centres and different local resources containing natural, economic and cultural elements create unequal status between regions and localities. This may create central–peripheral dependency within

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nation-states and regions as well.[17] This leads to the conclusion that some regions might be double-peripheries: peripheral regions of peripheral countries. In Poland and Slovakia, this notion might refer to Subcarpathian voivodeship and parts of the Košice region. They are peripheral in at least two ways: economically and geographically. They are less developed than the rest of their countries and situated at the outer border of the EU. Theoretically, patterns constructed in cores should reach them with a significant delay.

This brings the narrative to a certain conclusion and to the explication of this paper's aim. We would like to analyse the educational practices of certain Polish and Slovak museums in relation to patterns constructed in Western countries in order to determine whether peripheral museums of Central-Eastern Europe are open or closed to ideas of the new museology. We assume that the existence of ICOM and other transnational organisations involved in the sphere of cultural heritage makes it more difficult to precisely designate the core of the museum field. However, they undoubtedly support the construction of models or reference points for core as well as peripheral museums.

2. Towards an ideal type of museum education

Research shows a divergence in the understanding of museum education among actors within the field. In some of Polish museums the idea is treated as an umbrella term covering those sorts of museum work which are not collection-oriented (or have anything to do with interaction with museum's milieu).[18] From the sociological point of view, it would be acceptable to include all uses of this term. This "bottom-up" approach will be applied to the analytical part of the paper. An additional approach needs to be included, however, to provide the definition of museum education which is accepted as referential for the museum field. We argue that the ideal type of museum education is constructed upon concepts developed in the most influential institutions, which then might be compared with the actual functioning of museums in the peripheries.

The notion of ideal type as a methodological tool was introduced by Max Weber more than 100 years ago. It is an analytical construct—non-existent in empirical reality—composed of one or more points of view and emphasising certain aspects of a certain phenomenon.[19] Based on concepts developed by Western European or American museologists (thus core-state representatives), we will construct an ideal type of museum education. This does not mean that we favour those patterns or treat them as "better", or adhere to postcolonial thinking about museums. Rather, this strategy is a way of finding out whether global or local models of education dominate in semi-peripheries.

Construction of the ideal type would include explication of the desired meaning of museum pedagogy, situating it within the system of all museum practices, listing a set of activities which are "educational", and including participants (educators and audience). A useful tool for ordering and analysing cultural elements is provided by Wendy Griswold. Her "cultural diamond" allows the drawing of relationships between museum education (treated as a cultural

[17] BROSZKIEWICZ, Wojciech. *Kapitał kulturowy młodego pokolenia Polski współczesnej: studium na przykładzie wybranych społeczności Podkarpacia*. Rzeszów: Wydawn. Uniwersytetu Rzeszowskiego, 2010, p. 75.

[18] GRZONKOWSKA, Joanna, GÓRKA, Jacek. Edukacja a promocja - wspólne pola działalności. Współpraca czy rywalizacja? In: *Muzealnictwo* 54, p. 34.

[19] WEBER, Max. "Objectivity" in social science. In: SHILS, E.A., FINCH, H.A. eds. *Max Weber on the methodology of the social sciences*. Glencoe, Illinois: The Free Press, 1949, p. 90.

object), society, creators and receivers.[20] Local educators reach for pedagogical ideas developed in core states and popularised via global networks, yet they use them in accordance with local regulations.

1. Importance

Education is considered to be an important element of museum functioning. It is included in the informative function of the three-part system provided by Stephen E. Weil (to protect, to study, to inform) treated as the basis of the "new museology".[21] The movement emphasised the opening of institutions to their milieus and the change in the modern formula of the museum from the place of "enlightenment" to a participative model. At the global level the importance of pedagogy is strengthened by its institutionalisation: the Committee for Education and Cultural Action was one of the first international committees of ICOM, besides national organisations (like the Museum Educators Forum in Poland).

2. Distinction

Museum education is connected to the museum's communicative functions.[22] According to the document "Characteristics and quality criteria for museum education", the practice is composed of three elements: (1) the science of education and communication; (2) museology; (3) the specialisation of the museum.[23] This definition clearly moves the activity away from marketing practices, which are sometimes treated as a form of education. This leads to the disciplinary distinction: a certain set of activities focused on visitors requiring pedagogical and museological skills. Lucie Jagošová names museum pedagogue as a separate museum profession.[24] This is more and more often reflected in a formal, organisational distinction—the creation of educational positions or pedagogical departments in museums

3. A broad choice of methods

While the traditional experience of a museum visit is connected to an individual exploration or a guided tour, museum education consists of a much broader set of activities.[25] Beginning with the exhibition design (which may offer a more or less educational approach) and lessons similar to those of schools (yet conducted in a different, museum-based context), institutions also offer lectures, workshops, courses, and excursions.[26] Alongside these, there come some edutainment practices connected to interactive elements of exhibitions, or cultural animation activities which are more or less related to education. They might take a very simple or a

[20] GRISWOLD, Wendy. *Socjologia kultury: kultury i społeczeństwa w zmieniającym się świecie*. Warszawa: Wydawnictwo Naukowe PWN, 2013, p. 15. Museum education as a cultural pattern, a system of symbolic meanings and their conduction, is a cultural object. It is an element of broader museum social world but it is also in a relationship with musealised reality.

[21] WEIL, Stephen E. Rethinking the Museum. In: *Museum News* 69, 1990, vol. 2.

[22] DOLÁK, Jan. *Muzeum a prezentace*. Bratislava: Muzeológia a kultúrne dedičstvo, 2015, p. 22; TIŠLIAR, Pavol. The Development of Informal Learning and Museum Pedagogy in Museums. In: *European Journal of Contemporary Education* 6 [online]. 2017, vol. 3, p. 591, accessed 29 December 2019. DOI: 10.13187/ejced.2017.3.586

[23] STRÁNSKÝ, Zbyněk Z. Museology as a science (A thesis). In: *Museologia* 15, 1980, vol. 11, p. 37; BIEDERMANN, Bernadette. The theory of museology: museology as it is—defined by two pioneers: Zbyněk Z. Stránský and Friedrich Waidacher. In: *Museologica Brunensia* [online], 2016, vol. 2, p. 53. DOI: 10.5817/MuB2016-2-6

[24] JAGOŠOVÁ, Lucie. Muzejní pedagog jako (semi) profese. In: *Muzeológia a kultúrne dedičstvo*, 2015, vol. 2, p. 51–53.

[25] TIŠLIAR, The Development of Informal Learning and Museum Pedagogy in Museums, p. 591.

[26] KAČÍREK, Ľuboš, TIŠLIAR, Pavol. Múzejné exkurzie vo vyučovaní. In: *Museologica Brunensia* 2, vol. 3, p. 11.

complex form (such as a cultural event or a festival) and are conducted in or outside the museum building.

4. Educator as a mediator

In museum education, the approach to a visitor is related to developments in the general science of education. It seems that museum educational discourse is dominated by progressivism. This is reflected in the popularity of George Hein's constructivist[27] and David Kolb's experiential learning[28] theories. Learning in the museum context moves from a form of teaching that is traditional (didactic, expository), and has a one-directional information flow, towards a participatory and visitor-oriented one. The educator's role is not to give final answers, but rather to provide a space where visitors may interact with objects undisturbed, and look for the answers based on their own knowledge.

5. Full spectrum of visitors

While formally preoccupied with the education of the lower and middle classes, some museums maintained the aura of exclusiveness. There is an ongoing discussion about whether museums should serve the majority of people or only those who are well-prepared for the museum experience and may fully profit from it.[29] In particular, art museums were places where only members of the upper classes—those who were well-educated and wealthy—felt comfortable.[30] They did not provide clear descriptions for unprepared people. An ideal museum is a learning environment for children of all ages as well as a lifelong learning facility. It has educational programmes prepared for individual visitors, families and organised groups; it is also accessible for people with disabilities.

Those five components of the ideal type of museum education might exist in some museums. It is possible to introduce all of them to any institution, yet in reality several factors (social, economic etc.) may prevent the unit from a full embodiment of the idea.

Combining the constructed ideal type of museum education with the cultural diamond gives a broader view of museum education as a social object (Figure 1).

A museum is the centre of a specific "museum" social world and as such it is a referential point for practices for many individuals.[31] It includes forms of communication, symbolisation, universes of discourse, activities, memberships, sites, technologies, and organisations.[32] Designating cultural elements and practices understood as educational allows us to "extract" museum pedagogy from the complex museum "universe" and identify it as a cultural object. Distinction, therefore, is the basis for differentiating education from other museum practices. Its importance situates it in a certain place in the hierarchy of museum activities. It also relates to a museum's (as an institution) or an individual museum employee's recognition of the rank of pedagogy among other tasks.

[27] HEIN, George E. The Constructivist Museum. In: *Journal for Education in Museums*, 1995, vol. 16; HEIN, George E. Edukacja muzealna. In: SZELĄG, M., SKUTNIK, J. eds. *Edukacja muzealna. Antologia tłumaczeń*. Poznań: Muzeum Narodowe w Poznaniu, 2010.

[28] MAJEWSKI, P. eds. *Muzea i uczenie się przez całe życie: podręcznik europejski*. Warszawa: Narodowy Instytut Muzealnictwa i Ochrony Zbiorów, Muzeum Pałac w Wilanowie, 2013, p. 31.

[29] CLAIR, Jean. *Kryzys muzeów: globalizacja kultury*. Gdańsk: Słowo/obraz terytoria, 2009, p. 26.

[30] BOURDIEU, Pierre, DARBEL, Alain. *The love of art. European art museums and their public*. Cambridge: Polity Press, 1991.

[31] SHIBUTANI, Tamotsu. Reference groups as perspectives. In: *American Journal of Sociology* 60, 1955, vol. 6.

[32] STRAUSS, Anselm. A social world perspective. In: *Studies in Symbolic Interaction* 1, 1978.

The educator is given the role of a "creator", as a professional whose responsibilities include the organisation of educational activities. Depending on the museum, the number of educators, as well as their working conditions, may vary. This allows us to assume that the museum itself, with its policy, collections and staff, might be treated as an institutional actor influencing the work of the pedagogue (directly) and visitors (indirectly) who represent another element of the cultural diamond of museum education. The final component of the model includes methods. As predefined patterns of actions, they direct an educator's behaviour, but their actual performance is related to a pedagogue's own ideas and the visitors' needs. The relationship between methods, educator and audience is thus discursive.

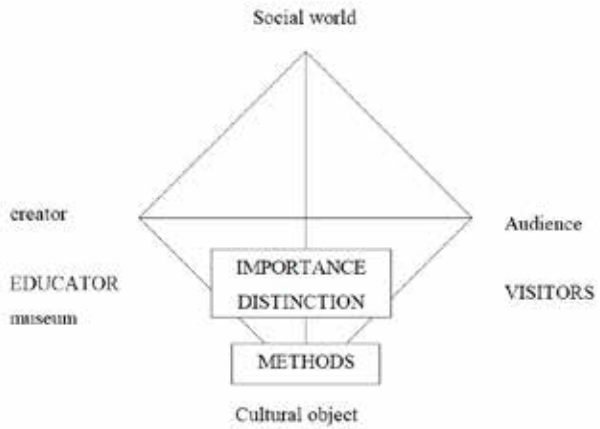

Figure 1: *Museum education as a cultural object*

3. Museum education in semi-peripheries

3.1 Description of the study

The data for the purpose of this study was collected in 16 museums. In each of them we conducted one in-depth interview. Our discussants were recruited mostly from the group of museum professionals who are responsible for collection care, research, exhibition planning, etc. (we will call them "curators"). Education might be their secondary duty; however, in many of the investigated museums it is equally as important as the substantial work. In at least three cases, the interlocutors held upper or middle management positions. Our argument is therefore based not on a "pure" educator's perspective, but rather on the perspective of people influencing institutional policies which are in various relations to museum pedagogy. In the research sample we aimed at providing the broadest possible perspective, so in choosing our interlocutors we focused on individuals working both in regional centres and peripheries (museums located in regional capital cities and small, remote locations);[33] and in large and small museums (from one-person units to those employing dozens of people). However, in every case the institutions were concerned with more than one field of study (art, history, ethnography, archaeology).

Concentrating on finding a peripheral perspective, we chose regions of Poland and Slovakia which might be identified as such. The Subcarpathian voivodeship (województwo podkarpackie) and Košice Region (Košický Kraj) are located in south-eastern parts of Poland and Slovakia respectively, and are thus geographically peripheral regions of the European Union. They are

[33] This gives us the possibility of addressing "double peripheries" or even "triple peripheries".

economically less well-developed and more excluded compared to the other areas in their respective countries[34]. Election results show also that the Subcarpathian voivodeship is the strongest supporter of the leading conservative and populist party Law and Justice and the right-wing Confederation.[35] Additionally, the region has a significantly greater percentage of people attending church services when compared to other regions.[36] The indicators of cultural peripherality of the Košice region are not as significant as the Polish ones. Although the support for populist and conservative parties is greater when compared to Western Slovakia, it is not as high as it is in the central regions of the country.[37] This may be due to the fact that Košice is the second largest city of Slovakia and its citizens amount to almost one third of the region's inhabitants. Since voters in cities more often choose liberal candidates, this may lead to the balance between regional centre and peripheries when looking at the *kraj* as a whole. The assessment of the degree of conservatism on the basis of the level of religious practices poses problems since Slovaks are not monoreligious. But based on the percentage of citizens indicating a lack of any religious affiliation, we can say that the Košice region, with 11.3% of people indicating their non-religiosity, is more religious when compared to western regions of the country.[38] Again, Košice itself is closer to Bratislava in the topic of non-religiosity.

3.2 Historical context of museum education in Poland and Slovakia

The development of museums' educational role in Poland should be connected with the Museum of Industry and Agriculture, founded in Warsaw in 1875.[39] This kind of institution, rooted in ideas of progress, positivism and industrialisation, was originally dedicated to the provision of agricultural teaching. It promoted research, and organised conferences and seminars. Positivism in Poland, then non-existent as an independent political entity, was dedicated not only to developing science, educating people, and improving living conditions, but also to connecting these purposes with the strengthening of Polish identity and preparing

[34] STOPA, Mateusz. New boundaries: regional consciousness in the Polish Subcarpathian Voivodship. In: WOJAKOWSKI, D. ed. *Borders and Fields, Cultures and Places: Cases from Poland*. Kraków: Nomos, 2008; SZUL, R. Surviving in a peripheral periphery—case studies from eastern Poland. In: *EUROPA XXI*, 2006, vol. 15, p. 136; KOTARSKI, H., TUZIAK, A., TUZIAK, B. Egzogenne i endogenne czynniki rozwoju regionalnego. Podkarpacie na tle polskich regionów. In: *Regionalny wymiar procesów transformacyjnych*. Rzeszów: Wydawnictwo Naukowe Uniwersytetu Rzeszowskiego, 2009; NOVOTNÝ, L., MAZUR, M., EGEDY, T. Definition and delimitation of peripheries of Visegrad countries. In: *Studia Obszarów Wiejskich* 39 [online], 2015, p. 39. DOI: 10.7163/SOW.39.3; MALKOWSKA, A., MALKOWSKI, A. Ocena zróżnicowania rozwoju województw przygranicznych w Polsce Południowej na tle kraju. In: *Zeszyty Naukowe WSES w Ostrołęce* 30, 2018, vol. 3, p. 221. Eurostat, At-risk-of-poverty rate by NUTS 2 regions; Eurostat, Severe material deprivation rate by NUTS 2 regions; Eurostat, Gross domestic product (GDP) at current market prices by NUTS 2 regions, accessed 17 November 2019.

[35] *Wyniki głosowania—Okręg wyborczy nr 9 [Rzeszów]*. https://pe2019.pkw.gov.pl/pe2019/pl/wyniki/okr/9; *Wybory do Sejmu i Senatu Rzeczypospolitej Polskiej 2019*. https://wybory.gov.pl/sejmsenat2019/pl/wyniki/sejm/okr/23; https://wybory.gov.pl/sejmsenat2019/pl/wyniki/sejm/okr/22, accessed 25 November 2019.

[36] Additionally, the data shows a significant difference between *communicantes* and *dominicantes* in favour of the former. This might be interpreted as participation in a church service as an element of tradition and not as the indicator of actual faith. SADŁOŃ Wojciech (ed.), Annuarium Statisticum Ecclesiae in Polonia AD 2019, Warsaw: Instytut Statystyki Kościoła Katolickiego, p. 27–34. Compare with LUCKMANN Thomas, *The invisible religion*: *the problem of religion in modern society*. New York: The Macmillan Company, 1967.

[37] Number and share of valid votes cast for political parties by territorial division http://volby.statistics.sk/nrsr/nrsr2016/en/data02.html, accessed 17 November 2019; Vote share in territorial districts and communes by political parties http://volby.statistics.sk/ep/ep2019/en/data02.html, accessed 17 November 2019.

[38] Resident Population by religion, by regions, 2001, 2011 Census, accessed 29 December 2019.

[39] HUDSON, A social history..., p. 64.

to fight for independence (so-called "organic work" and "work at the grass roots"). The Museum of Industry and Agriculture provided an environment for learning about Polish history and raising patriotic attitudes.[40] Similar motives guided organisers of regional museums in Galicia—the Habsburg-occupied part of Poland. The Museum of the Society of Friends of Learning, founded in 1909 in Przemyśl, was deeply involved in educational work with the youth.[41] Patriotic education was also the basis for cooperation between schools and museums in the late nineteenth and early twentieth centuries.[42]

It is difficult to describe the beginnings of Slovak museum education because of poor access to historic data and literature on the problem. With great caution, we can state that as the whole set of activities was connected to Slovak identity, including the formation of museums and collections, the museum pedagogy of the period was suppressed by the process of Magyarisation.[43] However, it is possible that its purpose was, to some extent, connected to the problem of maintaining (Slovak) national identity.[44]

The restoration of independence stimulated the popularisation of regional museums; however, fatal economic and political conditions hampered the process. The first formal Polish educational department was founded in 1936 in the National Museum in Warsaw. Thematic guided tours, publishing, operating cinema, and collecting feedback from the audience were among its responsibilities. The unit developed cooperation between the museum and schools, instructing teachers to conduct their own museum classes and to support them in the realisation of curricula.[45]

After the Second World War, Polish and Slovak (or Czechoslovak) culture demonstrated similarities to the Soviet model, at least in the 1950s. Museum communication and display strategies were connected to communist ideology.[46] In Czechoslovakia, museums were often defined as both "scientific-research" and "cultural-educational" facilities. Through their edifying work, they were supposed to promote socialist patriotism, but also to educate people and help them to understand the context of facts.[47] In the Polish People's Republic it was suggested that museums might play an important educational role along with schools and family. In the 1960s, the term "museums as universities of culture" was coined. There was also an emphasis on encouraging society to participate in museum enterprises. Educational departments became elements of organisational structures, at least in the largest institutions. Large-scale social research was conducted to provide empirical data for museum teaching practices and the workgroup "Museum pedagogy" was founded as well.[48] Another important

[40] Ibidem.

[41] STOJAK, Grażyna. *Świat wychowania przez sztuki piękne w polskiej szkole: edukacyjne aspekty wychowania przez sztukę w kształceniu nauczycieli plastyki*. Kraków: Oficyna Wydawnicza "Impuls", 2007, p. 112.

[42] Ibidem.

[43] DUCREUX, M.-E. Czechy i Węgry w monarchii habsburskiej w XVIII-XIX wieku. In: KŁOCZOWSKI, J., BEAUVOIS, D. eds. *Historia Europy Środkowo-Wschodniej*. Lublin: Instytut Europy Środkowo-Wschodniej, 2000, p. 389, 396, 402, 408.

[44] KAČÍREK, Ľuboš. Revolúcia 1848/1849 a Slovenské národné hnutie v múzejnej prezentácii. In: *Museologica Brunensia* [online], 2019, vol. 1, p. 19. DOI: 10.5817/MuB2019-1-3

[45] SZELĄG, P. Wprowadzenie do historii edukacji muzealnej w Polsce. In: SZELĄG, M. ed. *Edukacja muzealna w Polsce. Sytuacja, kontekst, perspektywy rozwoju. Raport o stanie edukacji muzealnej w Polsce*. Warszawa: Narodowy Instytut Muzealnictwa i Ochrony Zbiorów, Muzeum Pałac w Wilanowie, 2012.

[46] STRANSKY, Muzeologie a Archelogie...

[47] GREGOROVÁ, Anna. *Múzeá a múzejníctvo*. Martin: Matica Slovenská, 1984, p. 62, 66, 116.

[48] STOJAK, Świat wychowania przez sztuki piękne…, p. 118–119.

thing was that the position of a museum educator, then called "social-educational worker", was defined in a legal way along, with a list of their responsibilities, which were significantly broad.[49] The problem of cooperation between museums and schools became the topic of publications written either by academics or museum staff. Problems of linking museum visits with school curricula became the topic of several publications.[50] While the scope of pedagogical activities was quite broad (depending on the museum), it was mainly based on a traditional didactic and illustrative methodology. The actual status of museum pedagogues, which remained low, was another problem. While the legal basis for the organisation of museum education was promising, social-educational workers were not treated seriously by curators and managers. Pedagogical departments were places where people were assigned work while they waited for a vacant curatorial position. Scholarly work was regarded as more important. The lack of implementation of legal regulations and the employment of people who treated the positions of social educational staff as temporary were often the cause of poor quality in education.[51]

In current Polish museum pedagogy many changes may be observed. Educators have developed their own identity and sense of community. Thanks to increased access to the works of their foreign colleagues, they began to introduce ideas which were successfully implemented in Western countries. Thus—at least in the official discourse—George Hein's constructivist approach became the theoretical basis for museum education. Polish museum educators have their own organisation—the Forum of Museum Educators; they organise conferences and courses, do research and publish, thus demonstrating awareness of the changing social and cultural context.

A similar process may be identified in Slovakia. In 2008, the Union of Museums in Slovakia founded the Commission for Upbringing and Education in Museums, whose goal is to strengthen the position of education in Slovak museums. They organise and promote events for museum professionals in this field, recommend relevant literature, and even aim to create an archive of museum education materials created in Slovak museums.[52] The Slovak National Museum institutionalised museum education in one of its departments, the Centre for Museum Communication, as well. Some of its tasks are to prepare and carry out educational programmes, or to provide informal education in the field of museum education.[53] They even offer a course on museum education for employees of museums and other Slovak cultural institutions.[54]

Finally, courses on museum education are offered by Slovak and Polish universities. The Museology and Cultural Heritage study programme (Comenius University, Bratislava, Department of Ethnology and Museology) has courses on museum pedagogy as part of its

[49] SZELĄG, Wprowadzenie...

[50] GOŁASZEWSKI, Tadeusz. *Dziecko w muzeum. Funkcje muzeum w wychowaniu estetycznym dziecka*. Warszawa: Nasza Księgarnia, 1967, p. 31; UNGER, P. *Muzea w nauczaniu historii*. Warszawa: Wydawnictwa Szkolne i Pedagogiczne, 1988, p. 24; ZIELECKI, A. Podstawy metodyczne wykorzystywania pamiątek przeszłości w nauczaniu historii. In: ZIELECKI, A. ed. *Muzeum w nauczaniu historii*. Rzeszów: Wydawnictwo Wyższej Szkoły Pedagogicznej w Rzeszowie, 1989, p. 20.

[51] Ibidem.

[52] *Odborná komisia pre výchovu a vzdelávanie v múzeách*, accessed 23 November 2019, http://okvav.zms.sk/. *Fond múzejno-pedagogických materiálov*, accessed 23 November 2019, http://okvav.zms.sk/ako-vieme-pomoct-my/fond-muzejno-pedagogickych-materialov/.

[53] *Centrum múzejnej komunikácie*, accessed 23 November 2019, https://www.snm.sk/?centrum-muzejnej-komunikacie-2.

[54] *Kurz Múzejná pedagogika*, accessed 23 November 2019, https://www.snm.sk/?kurz-muzejna-pedagogika.

school curricula. Additionally, a joint study programme—Museology-Pedagogy—is about to be opened.[55] In Poland, the University of Rzeszów offers a master's degree course preparing future museum educators[56] and the University of Maria Curie-Skłodowska in Lublin runs a postgraduate study programme on the subject.[57]

To sum up, at least two patterns exist in today's museum education. The first one has its origin in the communist period (or even in the nineteenth century), with a traditional, one-directional, pedagogy and the educator considered to be of lower status; the second one places equal importance on scholarly work and education, which is sensitive to the changing needs of the audience and the whole society as well.

3.3 Importance

The importance of museum education is defined not only in relation to other sorts of museum practices, but also in a broader context. It sets up a system of links between different museum staff positions and the emphasis which is put on different fields of institutional work. As a pedagogical enterprise, it is compared to the overall system of education or upbringing, and it seems to be a universal practice—noticeable in Polish as well as Slovak interviews. It is also described as one of the activities building up the relationship between the institution and local government. In the case of Poland, the interlocutor's professional background and his/her position in the museum influence his/her evaluation of the importance of education. Graduates of studies in which the curricula included developing pedagogical skills[58] are more positively oriented towards educational activities.

There is a difference between the two countries in the case of curators (who are viewed as scientists or researchers) and educators' mutual recognition. In Slovakia the cooperation between them is emphasised:

> [...] Curator should be a scientist, a researcher, in the first place. And then there should be someone who can transform these things and findings into a form suitable for children. So yes, museums definitely have this educational function, but as I said, there are mostly those museum educators for that in museums. [SK-4]

In Poland curators sometimes show their superiority over pedagogues. In the 2016 study,[59] curatorial work (research and collection building) was shown as the core of one of the museums since the outcomes of this work provide the basis for educational practices. In the case of the interviews we analysed, this perspective is also visible, yet not as sound as in the case of the cited study:

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[55] *Realizované študijné programy muzeológie 2.1.24*, accessed 23 November 2019, http://muzeologia.sk/studij_programy.htm.

[56] *Muzeologia na Uniwersytecie Rzeszowskim*. http://www.muzeologia.ur.edu.pl/?page_id=22, accessed 02 February 2019.

[57] *Edukacja muzealna*. https://www.umcs.pl/pl/wyszukiwarka-studiow,118,edukacja-muzealna,64629.chtm, accessed 29 December 2019.

[58] For example, history studies with teacher specialisation, art education, etc.

[59] PORCZYŃSKI, Dominik. Rosnące znaczenie edukacji. In: PORCZYŃSKI, D., KOSIEK, T. eds. *Muzea Podkarpackie 2004–2014: globalizacja i europeizacja a przeobrażenia lokalnych instytucji kultury*. Rzeszów: Fundacja Rzeszowska Ośrodka Archeologicznego, 2016, p. 52.

R: Do you watch over the correctness of the educational activities?

I: Yes. Educators always come and show us their ideas of the lessons to check that no errors have crept in. [PL-4]

On the other hand, there are institutions which define education as their only and foremost mission. In the case of amateur museums, education is what drives the functioning of the unit. Exhibitions, guided tours, and museum lessons or workshops completely engage staff and usually include a low number of workers (owner and volunteers). In this case, the practices of collection building and thesaurisation recede into background. If the importance of education was represented on an axis of which one end would represent the lack of importance and the other the primacy of pedagogy among other museum practices, between both these ends several attitudes would appear, including equality of all aspects of museum work.

The importance of museum education was defined earlier in categories of institutionalisation. On a local level it is expressed in the emergence of the formal position of educator as well as independent pedagogy departments. Yet even institutions aware of the need of a specialised educational unit are often limited by their financial capacities. The lack of funding hinders the possibility of employing professional educators, while voluntary docents are still not popular in Poland. This results in the educational practices being conducted by curators in the majority of the Subcarpathian museums. Curators are in fact multi-functional employees. They take care of collections, plan exhibitions, carry out educational programmes, etc. This may result in them focusing on certain duties at the expense of others. In one of the museums, preoccupation with education led to worse collection management and research, while in another, marketing (which is also performed by curators) was the sphere which was evaded due to the lack of time. In fact, there are only a few museums in the Subcarpathian voivodeship which have their own educational units. Their emergence is related to the size of the museum. Usually, the largest ones have their own educational departments, but this does not apply in all cases. For comparison: national museums in Warsaw [PL-6; PL-7] have at least one pedagogical unit focusing on different kinds of teaching and informational practices. As for the Slovak museums studied, most of them have a department of museum pedagogy (or at least a museum educator post), which shows us that this trend is spreading to both bigger and smaller museums.

3.4 Distinction

The role of museum education is gaining ever more recognition in museum practice nowadays. It is considered to be a relatively new discipline in Slovak museums, even though not all of its forms are entirely new to them. In fact, one might still come across the opinion that it is a young, not properly defined branch of museum work that is still trying to determine its forms and methods. Also, in Poland there is no universal consensus on the subject of museum education. Some experienced curators—beginning their work in the 1980s—argue that all museum practices are "educational", while others share a conviction that there is a difference between curatorial and pedagogical activities. If—according to the concept developed in the previous chapter—museum teaching draws elements from academic educational preparation, this may be one of the factors distinguishing museum pedagogy from other sorts of museum work. Certainly, interlocutors with pedagogical courses or teaching careers behind them claim that they significantly help in the preparation and conducting of museum educational programmes.

This relates especially to curators graduating in history with a teaching specialisation. They may use different parts of their education in different fields of their job.

[…] for example I am a teacher by profession and I was never passionate about this occupation. However, I do not deny it is useful because while carrying out educational activities one has a certain support, it is a certain experience gained from the studies and it helps in didactic work. But it's of a completely different character [PL-2].

Another way of distinguishing museum education from other practices is based on a different assessment of musealia importance. While curators focus on, for example, the historical, ethnographical, or artistic (depending on their professional background) qualities of an artefact, educators demonstrate a pragmatic approach. The object is valuable if it might be used in educational practices. An object of low artistic quality, a copy, or a mass-produced product is significant if it helps visitors to understand certain aspects of culture. This is one of the reasons why supporting inventories are created. This does not mean that a more substantive approach is completely rejected. Interlocutors who perform their curatorial or educational responsibilities switch their object-oriented perspectives depending on the situation. In relation to school education, the described activities are pictured as more tangible, allowing a greater degree of involvement and the application of objects which are rarely shown or used during ordinary lessons.

There is an element of market-oriented perspective in developing a well-functioning sphere of museum education. And it appears in both Polish and Slovak institutions. While interlocutors generally agree that the transfer of information about the past to visitors is important, some of them perceive education as the way of providing funds for museum maintenance as well as making the museum noticeable in its local context. While the community-building feature of pedagogy is common for both regions, Polish museum workers speak more openly about the economic aspect of it. Collection building and research is not as visible and attractive for the general audience as visitor-oriented educational practices. A well-run museum with an exquisitely developed educational department might be treated as a valuable resource in territorial marketing strategies as well as a support for actions oriented towards community integration. Since education and marketing are activities which involve dealing with people from outside the institution, they are often treated as almost similar. This often leads to a situation in which museums create departments combining both kinds of responsibilities. This combination may often result in an unjustified merging of education and promotion and treating them as one. In some of the Polish museums, promotional tasks were counted as pedagogical.[60]

Last but not least: setting up independent pedagogical departments in museums (or at least creating individual educational positions), which has been already described as an indicator of the importance of educational practices, is also a means of strengthening the distinction of museum pedagogy from other museum activities. Institutionalisation is a formal way of assigning the responsibilities to individual professionals and supporting the cooperation between various parts of the organisation.

[60] SZELĄG, M., GÓRAJEC, P. Edukacja muzealna w Polsce. Podsumowanie "Raportu o stanie edukacji muzealnej w Polsce". In: SZELĄG, M. ed. *Edukacja muzealna w Polsce. Sytuacja, kontekst, perspektywy rozwoju. Raport o stanie edukacji muzealnej w Polsce*. Warszawa: Narodowy Instytut Muzealnictwa i Ochrony Zbiorów, Muzeum Pałac w Wilanowie, 2012.

3.5 Methods

The common trait for Slovak and Polish museums is the vast range of activities. All of the studied museums offer guided tours of exhibitions, programmes for schools, and museum lessons. Exhibitions are usually designed for individual visits; however, a guide is compulsory in some of the Polish and Slovak institutions. Audio guides are also offered by some units. Electronic devices and multimedia are introduced to cover those aspects of culture which cannot be learned through traditional exhibiting methods. Where musealia, descriptions and charts are not enough, interactive programmes, films and presentations are provided.

Museum lessons are conducted in exhibitions or lecture rooms, though some institutions even have a specifically designated space for these activities. Interviewees seem to understand this kind of pedagogical activity in different ways. Lessons are described as PowerPoint presentations on local history, meetings focused on certain parts of exhibition, and in one case, a guided tour.

The majority of Subcarpathian institutions offer practical activities such as workshops, which are very popular among school groups, especially before Christmas. They may be strongly connected to themes around which exhibitions are built, but in many cases they are not linked to them in any way. However, museums only rarely provide programmes that are very loosely connected to the museum itself, as in the case of the Regional Museum in Dębica, where an IT course was conducted in order to teach some basic computer skills to groups from the University of the Third Age. The link with museum education was established by the inclusion of lessons on how to retrieve archival information. Some of the Polish as well as Slovak units offer day camps for children during holidays.

Excursions also seem to be a standard way of undertaking museum pedagogy in Subcarpathia. They usually focus on places important for local history such as buildings, streets or cemeteries, but one museum also proposes tours in the countryside. Less popular are location-based games utilising local heritage, historical persons, or events. One example is a questing event organised by the District Museum of Rzeszów, "Trail of the Central Industrial District", focusing on the history of the interwar period plan for the development of Polish industry. Additionally, the Košice region's museums offer city tours and special events that take place outside the museum itself.

Some of the museums organise events for larger numbers of people or participate in events prepared by local governments, providing their own booth where activities—which may have varying degrees of educational content—are conducted. They may include historical re-enactments, concerts, etc. Educators are also involved in the organisation of commemorative or patriotic events.

Unique practices which were defined as educational include displays of fairy tales with a "retro" slide projector and a beer degustation in a museum preserving local brewery traditions.

In the Podkarpackie voivodeship, most of the described activities are conducted in museum buildings, but some of them are carried out by educators elsewhere: in schools, kindergartens, or community centres. They also help to meet the needs of schools located far from local centres—the towns and cities in which these cultural institutions are located. It is not very common, but some museums include such a possibility in their offer. However, not all are satisfied with the outcomes:

R: Do you carry out any activities outside? Let's say, visits in schools?

I: We tried, colleagues tried to do this as part of those workshops in nearby villages but it was a little bit of a washout. Sometimes it happened that the school management directed to those lessons many more children than was planned, so it couldn't fully succeed. With such talks or historic lessons we never tried it, however. All of that is related to the lack of personnel. Anyway [...] the IPN[61] practices [activities outside], but from that what I know museums would rather accept [visitors] in their own locations than go somewhere for such purposes [PL-3].

Insufficient funding is the basic factor which—according to our interlocutors—hampers effective planning and realisation of educational programmes. Underfunding of the cultural sphere also leads to insufficient employment. A low number of staff members can, in some cases, make it very difficult to take care of collections and plan sophisticated pedagogical programmes.

Museums do not concentrate only on museum programmes in their efforts to educate visitors and shape their understanding of the given region. Both permanent and temporary exhibitions also contribute to these goals. After all, it is generally acknowledged that museum exhibitions have a (hidden) educational role. While interlocutors from both countries directly or indirectly imply this, Slovak interlocutors mostly agree that the primary goals of exhibitions are to pass on relevant information, build a positive relationship with the museum, form opinions and attitudes towards the region and its history, or even to raise questions for the visitors to think about on their own. We might say that this shows us that at least some of the museums are using a constructivist approach to learning.

While collections are the basis for museum pedagogy (either exhibited or stored), most of the interlocutors in both regions said that they are trying to use some modern technologies in their exhibitions. There is a slight difference in their motivations, however. Slovak respondents mention that they try to introduce novelties because people expect them to. That is probably one of the reasons why museums nowadays tend to adopt interactive approaches to education and connect the learning process with entertainment (sometimes the term *edutainment* is used). It is also thought that such an approach makes learning in museums easier and more enjoyable. One of the Polish curators mentioned that multimedia can provide information which for various reasons could not be included in an ordinary exhibition—for example, detailed descriptions or representations of objects which are non-existent or inaccessible. However, traditional elements still prevail because museums mostly do not have sufficient funds for the upkeep of multimedia equipment. Among those that are more common are touch screens, audio guides, or screenings. However, the lack of resources makes it difficult to buy and introduce them.

3.6 Educational approaches

While constructivist education is the approach most widely accepted by museum educators, in the Polish museums we studied, a more traditional method dominates. To a greater or lesser extent, educators set themselves in the position of authority on topics related to the museum's profile. It does not mean that individual interpretations made by visitors are not welcomed. The issue depends on two factors, however.

As already mentioned, exhibitions are usually designed for individual visits and equipped with elements supporting visitors in the interpretation process: written descriptions, tour

[61] Institute of National Remembrance.

guides, audio guides, interactive electronic devices, films, etc. However, one interlocutor admitted that an educator's support is needed to fully learn about the exhibition's topic, and in another museum a guide's assistance is treated as compulsory. This may either mean that the exhibition as a source of information is not able to communicate everything about the local history and culture, or that museums would like to attain control of the interpretation. The educator's assistance is therefore a factor influencing the degree of freedom of interpretation.

The status of the pedagogue and their control of the interpretation is related to the status of the visitor. It is strongly connected to the age of the visitor, their knowledge, their professional background or their ability to support their statements with certain facts:

R: When dealing with visitors, how is the relationship shaped? Do you and the custodian prefer the [kind of] relationship when you speak and guests listen or is the discussion and sharing of thoughts possible?

I: It is possible but after discussing the part [of the exhibition], and not during that. I'm always happy when someone asks questions because it means he/she is interested in something or something interested him/her.

R: Do you allow interpretations different to those you are used to?

I: We may always discuss that.

R: Sometimes somebody considers himself [or herself] an expert and when somebody suggests another interpretation of a certain event, person or object...

I: That's great, but let him [or her] say on what basis, indicate the source [...] [PL-5]

In the case of children and youth, educators situate themselves in the position of authority, assuming that young visitors should be subordinate and listen to the narrative rather than discuss it. It may be caused by at least three factors. Firstly, it is based on a conservative perspective on the relationship between generations. Secondly, educators with an academic pedagogical background based on a traditional "Prussian" model still introduce this to museum teaching. Thirdly, some interlocutors share a conviction that the Polish system of education leaves students unprepared for cultural participation, thus unable to take part in discussion, so museums must provide the knowledge that they lack. In the case of adult visitors, discussion is welcomed since they have the benefit of the previous educational system, and they have greater experience and knowledge, so they are treated as equal disputants. Professionals participating in museum activities as visitors are treated as equal, or, in the case of certain topics, as superior.

Slovak interviewees seem to put more emphasis in their narratives on the overall atmosphere of the museum visit. They point out that it should be pleasant and positive, and that this is especially true for museum education activities. Ideally, museum educators and lectors should be professionals with good communication skills who are able to encourage discussion and tailor the lecture or the programme to the group (children, laymen, professionals):

Of course, we always appeal to our lecturers to ask people whether they have any questions, and to have the knowledge as well [...] to be able to answer them, so that it would not happen that the lecturer cannot answer them or tells them to look it up. [SK-5]

Educators should take on the role of a facilitator to make the museum visit a pleasant experience, so that the visitors will want to come back to the museum.

Most Slovak interlocutors admitted that some form of museum educational programmes had been in place for a longer time—even before the political changes in 1989—just under a different name. Of course, museums (and educational activities) had an additional role at that time—they were supposed to educate people in the official state ideology as well. Nowadays, on the contrary, museums should be politically neutral and try to objectively evaluate the past, even though they can promote feelings of patriotism (in the sense of national or regional identity and pride), belonging, and tolerance. The Polish interviewees did not pay too much attention to the communist period. This is due to the fact that a majority of them did not work in museums before 1989. The participant with the longest experience suggested, however, that the organisation of displays in a local community was based on a balance between formal (i.e. ideological, state) history, and local experiences and memories [PL-1].

3.7 Visitors

It is difficult to organise data on museum audiences. The most appropriate classification is based on age and origin. One can venture a statement that the composition of an audience may also say something about the institution. The demographic composition of the museum's social milieu narrows the scope of potential visitors. Elderly people pay a visit to some museums quite often, while in others they rarely show themselves. It is difficult to prepare a programme addressed to university students if there is not any higher educational institution in a town. Thus local demography, a museum's knowledge of it, the educational programmes it offers, and marketing build up the actual audience. Most of the museums studied—regardless of the country—do not focus specifically on one single group of visitors, but they try to cater to the whole population. Of course, the prevalent type of visitors can also be linked to the type of museum, and its exhibitions and programmes. The institutions we studied have developed relationships—often long-term—with different parties, yet some of the interlocutors prefer working with youth and adults, rather than with children. In some cases, they try to form groups of "friends of the museum" or just regular museum-goers through longer-lasting programmes and recurring events.

In the majority of the Polish museums studied, schoolchildren visiting the institutions in organised groups form the most numerous part of the audience. One of the interlocutors stated that they might even amount to 70% of all the visitors. Cooperation with schools is perceived almost as a basis of educational activities, but not without certain difficulties:

> Usually these are weekly activities targeted at organised school groups. Those are, mostly, elementary schools, and these are schools which, as I say, have the opportunity of introducing the topic [of a museum visit] to the plan of implemented curricular activities. Secondary and high schools make the minority [of the organised school groups] [...]. But for this reason we got the signals from teachers there is a problem with the organisation of visits at institutions during the school hours. [...] one hour isn't enough and [in] secondary schools, older elementary school groups, secondary schools and high schools, subjects are taught by different teachers and it is difficult to arrange more time to visit a museum [...] and get back [to school]. [PL-8].

In Slovakia, the idea that museums should serve only as a substitute for schools is outdated. However, that does not mean that museums do not offer programmes or activities for schoolchildren. As in the case of the Subcarpathian voivodeship, elementary and secondary

schools usually comprise the biggest and probably the most important off-season group of museum visitors. It is only natural that museums try to come up with activities based on school curricula that should complement school subjects, whether they are focused on national history, local history, biology or technical fields. In Slovakia these programmes are always interactive, requiring active cooperation or using forms of play:

R: What would you say was the best way of transferring information to visitors?

I: Well, that would be interactive programmes. That is also for adults. [...] So it is this interactive approach, for example to go over some topic, talk about something, and then to create something for it, like a meeting, or to do something manually, because people like to listen and.... Well, this requires some more work, then, and promotion in public and we have to "educate" the people who come here, because not everyone is interested in it, but there are two appreciative groups, and those are children and the retired. [SK-1]

As already mentioned, in Poland the degree of interactivity is sometimes limited to the questions asked by the educator after his/her presentation. Many museum pedagogues in both regions cooperate with teachers when creating the activities or they even bring those activities over to schools. In this way, museums not only educate children, but try to shape their attitudes towards museums as institutions.

Another large group that museum workers concentrate on comprises elderly, mostly retired, people, because they have a lot of free time and they often welcome the possibility to spend it in an active way. One of the Slovak museums even incorporates a University of the Third Age, while in the case of Polish institutions, Universities of the Third Age are partners and make up an important part of the audience. In both regions some of the studied institutions prepare programmes for pre-school groups. Families with children are an important category of museum visitors as well. Museum workers generally believe that if children see that museums are places where they can both learn new information and have fun, then they will come back more often, and also later on in life. That is why the offered programmes are made to both be informative, and to provide interest and amusement. Museum workers also recognise the need to vary the content of lectures and guided tours based on the age of the audience, thus making them more accessible and easier to understand.

Museums are aware of people with disabilities. As they need special attention and conditions to participate in a museum experience comfortably, some museums have introduced new equipment to help this part of their audience to learn about local history and culture. One of the studied Slovak museums offers specialised programmes for people with impaired vision. A unique feature of certain Košice region museums is also an effort to engage members of national minorities.

The majority of visitors are members of the local community. However, in one case, groups from outside the town form the largest part of the audience. According to the curator, this is due to a lack of support from the local government, which is not interested in historical education and does not encourage teachers to organise museum trips. University students appear only in the narrative of the curator working in Rzeszów. Last but not least, the museums we studied also receive foreign visitors, although they do not form a significant part of the audience in these institutions. Even smaller, local museums attract foreign visitors or visitors

from different parts of the country during the summer season, thus spreading the awareness of the locality among different groups of people and improving understanding of local traditions.

4. Conclusions

In opposition to the simplicity of theoretical framework, the isolation of museum education as a cultural object from the broader context of the museum social world is actually very difficult. In the reality of South-Eastern Poland and Eastern Slovakia, pedagogy seems to be strongly connected and intertwined with other spheres of museum practices such as curatorial and marketing work. This can be seen mostly in the interrelation between the distinction and importance of museum practices. Institutionalisation of educational departments and pedagogical positions is not only a matter of formal differentiation, but also of underlining the significance of pedagogy among all of the museum's responsibilities.

A comparison of museums in the two regions shows certain differences which are mostly grounded in local specifics. Not every region has, for example, a population connected to a strong brewing tradition (as in the Polish town of Leżajsk) or several ethnic minorities (as in the Košice region) that make up a significant part of the audience. However, developing modern exhibitions or educational programmes based on such heritage and including these unique groups in pedagogical strategies shows a certain reflexivity which is actually an indicator of modernisation.[62]

Both regions share a common history, but the interlocutors from each country address the previous political period differently. The organisation of formal culture under communist regimes shaped the specifics of Polish and Slovak (then Czechoslovak) museum pedagogy. While Slovak curators recall in their narratives ideological motives contained in museum work during those times, the Polish speak about certain balance between ideology and well-remembered local history (e.g. commemoration of local members of the Home Army) in the 1980s. There is, however, a certain continuity in museum functioning after the period of "people's democracies". On a social level, this link is provided by curators who trained and worked during the previous political period who also help the younger generation of museum workers to socialise within the organisation. Museum staff with longer work experience are in a position in which they can compare the conditions of the communist period with those of recent times, and identify which of them better support museum work. It also enables them to shape the new generation by transferring both good and bad patterns of conduct.

There are some minor differences between education's importance in Slovakia and Poland. The interviewees from the Košice region describe the relationship between education and curatorial work as an example of functional linking. They depend on each other. The importance of educational practices is also visible in its formalisation: setting up independent pedagogical departments.

The relatively lower rank of museum education in comparison to curatorial responsibilities in Poland shows the continuity between the former and current political periods. It needs to be underlined that the actual situation is not based on ideological, but on social elements. In fact, it is difficult to tell why curators' status is higher than educators'. Maybe longer traditions or being the majority of museum staff were the factors that gave curators stronger positions in Polish museums? Maybe it is that the knowledge of the topic and expertise in research is more

[62] BECK, Ulrich, GIDDENS, Anthony, LASH, Scott. *Modernizacja refleksyjna: polityka, tradycja i estetyka w porządku społecznym nowoczesności*. Warszawa: Wydawnictwo Naukowe PWN, 2009, p. 17.

valued than the actual ability of presenting them to the audience? There is also the economic factor which hampers the improvement of educators' status; however, this did not appear in this research. The lack of proper financial support prevents better organisation of pedagogy units, even if they are considered to be necessary in museum work.[63]

The last difference between the Slovak and Polish museums is a different approach to the educator–visitor interaction. Polish interlocutors seem to be more formal in this aspect. Although they indicate that a more fun-oriented character exists within museum education (in comparison to more formal qualities) a museum visit is strictly connected with transferring the information and its organisation is often reminiscent of a school lesson. It may be compared to Hein's "didactic, expository" education, similar to the schoolteacher–student relationship. It is especially visible in relations with younger visitors. Slovak interlocutors seem to be putting more emphasis on the overall atmosphere of the museum experience and indicating the importance of educator's attitude in this context.

If we do not count the discussed differences, education appears as one of the most important elements of museum work. New methods are developed and introduced to cover all possible members of the audience. The possibilities are limited by money shortages, however.

The fact that museum education in both regions underwent changes is clear. Despite their peripherality, their practices are close to the constructed ideal type. The difference results from local specifics, which is more clearly perceived in Poland. On the basis of the collected data we may state that the globalisation process in the case of museum pedagogy of the Košice and Subcarpathian regions assume the form of hybridisation. Global patterns, such as multiple methods and the broadening of the spectrum of visitors were introduced to everyday practice, yet certain aspects—such as the traditional, school-like pedagogical approach, or considerably lower status of educators in Poland inherited from the former political period—remain unchanged. Looking at the problem from a cultural globalisation perspective, it seems that the process of acquiring global patterns is much more advanced in Slovakia than in Poland. This may also be a result of the lesser degree of conservatism in the region. Still—the differences exist and their interpretation from the cultural perspective only is insufficient. Curators in both countries agree upon the need for introducing changes in museum education, but they find it impossible at the moment due to the lack of proper funding. This shows us that the economic peripherality makes change more difficult. The globalisation of museum education in semi-peripheries is then a process of interaction between global patterns and local conservatism along with a constant underfunding of the cultural sphere.

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[63] PORCZYŃSKI, Rosnące znaczenie edukacji, p. 57.

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Values, strengths and futures of museums, libraries and community centres as seen by experts in the field: First round results of a Delphi study [1]

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Values, strengths and futures of museums, libraries and community centres as seen by experts in the field: First round results of a Delphi study
In the process of building local communities with shared cultural values, museums, libraries and community centres are key agents in civil society. When these institutions project specific notions and ideal types of identity and citizenship, they have the potential to produce changes in people's behaviour. It is only natural that political bodies are interested in these processes. On 16 September 2016, the Ministry of Human Capacities of the Hungarian Government launched an EU-funded project with the primary aim of strengthening social cohesion within the region. As a part of this project, we surveyed 59 professionals working in Hungarian museums, libraries and community centres, using the Delphi method, to gain insights about their capacities, needs, and visions. This article presents the results of the first round of analysis. Respondents' answers were analysed using NVivo qualitative data analysis software, which resulted in a thematic map showing the main problems professionals in these sectors are struggling with, and highlighting the kinds of visions they had for their institutions' future. The study clearly shows that the cultural sector is plagued by financial problems, and that there is a strong need for reform when it comes to the professional training of workers in these fields. Regarding the future, visions are centred around cultural institutions increasingly becoming community spaces, thinktanks, and ideas workshops that consciously guide community formation.

Keywords**:** museums, libraries, Delphi method, experts, group judgement, forecasting

Introduction

On 16 September 2016, the Ministry of Human Capacities of the Hungarian Government launched a project with the primary aim of strengthening social cohesion within the region. Funded by the European Union, a project entitled "Acting Communities – Active Community Involvement" offered the means to realize this aim by increasing the involvement of community

[1] Acknowledgement: I would like to express my gratitude to Renáta Csorba and Ágnes Schattmann for their contribution to data collection and to Gabriella Szilvia Kuhn for her contribution to the analysis. This article is based on the research reports of the EU-funded project „Cselekvő közösségek – aktív közösségi szerepvállalás" (EFOP-1.3.1-15-2016-00001) available at https://cselekvokozossegek.hu/wp-content/uploads/Delfi-j%C3%B6v%C5%91-%C3%A9s-trendkutat%C3%A1s_angol-nyelven.pdf and https://cselekvokozossegek.hu/wp-content/uploads/Delfi-j%C3%B6v%C5%91-%C3%A9s-trendkutat%C3%A1s-web.pdf

centres[2], libraries and museums[3]. This increased involvement of cultural institutions comes at a time when parts of the public sector are under pressure from economic and political restructuring, as well as ongoing changes associated with party-political skirmishes over cultural influences, the debate around which is also divided along disciplinary and nationalistic lines. The Ministry of Human Capacities is confronted with the question of how and on what basis to allocate scarce and limited resources among competing projects. In addition, it must also seek to target its support—which can be actuated in a variety of ways—where it is needed the most, ensuring the available resources to address problems relating to social cohesion are deployed where they can have the greatest impact.

In this context, it is extremely important that support for new initiatives, newly introduced community development techniques, and specific improvements in local social communities effectuated by local governments and other organizations rely on data-based decisions. It is equally important that this data should reflect the visions, needs and capacities of the actual people in question: more specifically, of those elected or appointed experts who form, implement, and supervise the policies affecting local communities. This kind of informed approach makes it possible to identify future trends within each sector, and brings clarity to the process of assessing the situation before deciding whether to support or hinder the long-term adoption of new initiatives.

The problem is that currently, there is no previously documented knowledge, and no consensus on key topic areas among Hungarian community centre, library and museum experts that can provide insights for higher-level decision-making when it comes to developing healthy, field-specific cultural communities. To fill this gap in reliable information, we will present results from the first round of a three-round Delphi study, which consists of the aggregation, analysis, interpretation and discussion of primary data collected from 59 expert participants affiliated with Hungarian institutions.

The future of museums, libraries and community centres: theoretical framework, key concepts and literature review

The theoretical frameworks of this study are embedded in a social constructivist approach. The social construction of visual meaning can be looked at as a political process in which meaning and power are inextricably linked[4]. Interactions with interpretations based on the material and intellectual cultural memories of previous generations are assumed to shape the way of thinking and behaviour of those who communicate with the past through them. Sharing the same cultural codes paves the way to a more-or-less shared common identity among people

[2] By community centres, we refer to local public institutions based in villages, towns and cities offering education and cultural activities to the people of that neighbourhood. As well as providing a venue for local theatrical or musical events, some posess small collections of assorted books and magazines, and may host exhibitions of work by local artists; however, they are less specialised in these activities than libraries and museums.

[3] ARAPOVICS, Maria, PONYI, Laszlo and BODOG, Andras (eds.) *The Examination of Cultural Community Development Processes in the Municipalities of Hungary*. Budapest: Hungarian Open Air Museum—Museum Education and Methodology Centre, NMI Institute for Culture Non-profit Ltd and National Széchényi Library, 2019.

[4] STOCCHETTI, Matteo. Digital Visuality and Social Representation. Research Notes on the Visual Construction of Meaning. In: *KOME—An International Journal of Pure Communication Inquiry*, vol. 5, 2017, No.2, pp. 38–56.

distant from each other in space and/or time[5,6]. Memory institutions[7] that mediate between the past, present and future are of central importance both to the current Hungarian government and to the European Commission, which, based on Article 3.3 of the Lisbon Treaty, not only safeguards European cultural heritage, but secures processes through which this past heritage can enrich the individual lives of European citizens and enhance Europe's social capital.

The framework also relies heavily on the assumption shared by a large proportion of studies looking at the future: namely, that representations are performative; they have a potential to produce changes in people's activity[8]. Benedict Anderson's notion of "imagined communities"[9] has also had a significant impact on how we will try to explain our data. Anderson's line of thought establishes that projecting sentiments of belonging and brotherhood beyond those of direct experience is a primary component in forming imagined national communities, and goes back as far as what has been called the "circuit of culture"[10]. Representations by museums and libraries are one of the central practices involved in producing culture, and public education provides common cultural codes by which to interpret these representations in a roughly similar way. This is how institutions mediate *cultural memories* which, depending on the current needs of society and individuals, become socially constructed *heritages*[11,12].

The framework emphasises the role of thematization and interpretation, as opposed to material objects and fixed meanings, since it is these features that make museums and libraries key agents in civil society: when these institutions project specific notions and ideal types of identity and citizenship, they make cultural participation a space for the formation of both a cosmopolitan and a national citizenry[13].

The *Acting Communities – Active Community Involvement* project appears to reflect these changes and new relationships between the individual and society. By means of digital media, a certain "culture of participation" has emerged, along with the concept of the "smart audience".[14] Museums and libraries have started to aim for a more dynamic engagement between their collections and their visitors.[15] A report by Yarrow et al. highlighted that while, in the past, cultural institutions assumed the public would take the initiative to visit,

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[5] APPADURAI, Arjun and BRECKENRIDGE, Carol A. Museums are good to think: Heritage on view in India. In: I. Karp et al. (eds.), *Museums and communities: The politics of public culture*. Washington: Smithsonian Institution Press, 1992, pp. 34–55.

[6] HARRISON, Rodney. *Heritage: Critical Approaches*. London: Routledge, 2013.

[7] DEMPSEY, Lorean. Scientific, Industrial, and Cultural Heritage: a shared approach. A research framework for digital libraries, museums and archives. In: *Ariadne*, Issue 22, 2000. http://www.ariadne.ac.uk/issue/22/dempsey/

[8] FULLER, Ted. and LOOGMA, Krista. Constructing futures: a social constructionist perspective on foresight methodology. In: *Futures*, 41, 2009, pp. 71–79.

[9] ANDERSON, Benedict. *Imagined communities: reflections on the origin and spread of nationalism* (revised and extended edition). London: Verso, 1991.

[10] HALL, Stuart. *Representation: Cultural representations and signifying practices*. Culture, Media & Identities Series. Milton Keynes/London: The Open University & Sage Publications Ltd., 1997.

[11] GRAHAM, Brian J. et al. *A geography of heritage: power, culture and economy*. London: Arnold. 2004.

[12] ASSMANN, Jan. *Cultural Memory and Early Civilization: Writing, Remembrance, and Political Imagination*. Cambridge: Cambridge University Press, 2011.

[13] CARTER, Jennifer and ORANGE, Jennifer. Contentious Terrain: Defining a human rights museology. In: *Museum Management and Curatorship*, vol. 27, 2012, No. 2, pp. 111–127; ORANGE, Jennifer. Translating Law into Practice: Museums and a Human Rights Community of Practice. In: *Human Rights Quarterly*, vol. 38, 2016, No. 3, pp. 706–735.

[14] VEGLIS, Andreas and MANIOU, Theodora. The Mediated Data Model of Communication Flow: Big Data and Data Journalism. In: *KOME—An International Journal of Pure Communication Inquiry*, vol. 6, 2018, No. 2, pp. 32–43.

[15] BLACK, Graham. *Transforming museums in the twenty-first century*. London: Routledge. 2011.

> most institutions are now looking at outreach and other ways to be more relevant to their communities and their customers' daily lives. The focus is now on the experience, both real and virtual, of the institution itself, as well as the institution's collections.[16]

This has turned these institutions into complex social entities which facilitate the interactions, meaning-making and meaning-negotiations of heritages from the past by prioritizing, for example, which books to digitize, or which special collection or exhibition to display online, thus widening their reach and attracting more (and new) customers[17]. The approaches these social organizations take with regard to audiences, however, differ from each other in at least one significant point. While museums tend to influence pre-existing user communities (as visiting a museum is often a social act), libraries present heritages to individuals: people visiting a library choose reading materials for themselves or for their children. Digitization has also had different effects on the formation of communities in libraries and museums. While, in the past, museums had to be visited in order for the communication of memory to take place, books were typically borrowed and read at home; in practice, newspapers and magazines (which contain current stories, not past history) were the most common materials read in situ in libraries. This means that the museum-customer relationship was more deeply affected by the introduction of new technology—for instance, the possibility of a virtual tour of an exhibition—than the library-customer relationship was by ideas such as digitally accessible collections. Both developments made it possible for the communication of memory to occur at other locations, chosen by the customer, but this was something that a customer of a library already had (though to a lesser degree[18] and in a different form, with the borrowing of physical copies), while it was new to museum visitors.

On the other hand, cooperation is not limited to existing or potential customers. In fact, museums and libraries, being in a sense two branches of the same tree (in that they share similar missions and audiences, at least if we speak about public institutions, not private collections) are often involved in collaborative projects. The role of community centres in the bigger picture is twofold. First, they can provide a space for touring exhibitions of library and museum materials, helping to increase the dissemination and understanding of cultural heritage. Second, they can cooperate in various educational activities contributing to community renewal and active citizenship. These activities, falling under the communication of cultural heritage in a wider sense, benefit from a range of EU programmes and funding.[19] The "Acting Communities – Active Community Involvement" project, as an example, brought Hungarian museums, libraries and community centres closer together by forming an alliance

[16] YARROW, Alexandra; CLUBB, Barbara and DRAPER, Jennifer-Lynn. *Public Libraries, Archives and Museums: Trends in Collaboration and Co-operation*. International Federation of Library Associations and Institutions Professional Reports 108, 2008, p. 5. Available online: https://www.ifla.org/publications/ifla-professional-reports-108

[17] GIBSON, Hannah., MORRIS, Ann and CLEEVE, Marigold. Links Between Libraries and Museums: Investigating Museum-Library Collaboration in England and the USA. In: *Libri*, vol. 57, 2007, No. 2, p. 63.

[18] There are materials that cannot be borrowed and can only be read, either in their original or preserved (on microfilm) form, in the actual building of the library.

[19] 2018 was the European Year of Cultural Heritage, and in the past seven years, a total sum of €3.2 billion was invested in heritage from the European Regional Development Fund. A further €1.2 billion was allocated for rural heritage by the European Agricultural Fund for Rural Development, and the Seventh Framework Programme allocatad around €100 million for heritage research) (Supporting Cultural Heritage 2017).

of museum and library professionals, along with local cultural experts, in order to establish a joint programme of culture-focused community development with the aim of increasing community involvement and social activity among local residents (including civil servants and local government employees).

Given the increasing significance of inter- and extra-institutional forms of cooperation, it is worth considering how librarians, education and museum professionals see their present and future roles. How do these experts conceptualise the role and position of their institutions? This question seems to be of interest to the wider academic public; however, as Huvila[20,21] points out, empirical research on this topic, especially in the European context, has been scarce and limited to specific countries. There are currently no up-to-date studies on museums and library professionals' self-conceptualizations except, perhaps, with regard to the digitization of archives, texts and exhibitions, where there is agreement across the sector that nowadays a much more holistic approach—involving social, cultural, and behavioural approaches—is needed to interact with audiences, beyond the mere focus on access or the adoption of digitization technologies[22,23,24,25].

Outside this narrow but important territory, sporadic results from small-scale qualitative studies have failed to indicate any general trends or consensus among experts with regard to the sector's needs, visions or implementation strategies. Maceviciute and Wilson[26] studied perceptions of present and future issues relating to Swedish libraries, and found (though the results were not especially decisive) that different types of library had different priorities. Concerns about the relation of libraries to education and society at large were more frequent at public, regional and school libraries, while academic and special libraries emphasised the impact of new technologies and changes in scholarly and business communication. Huvila[27] found that archive, library, and museum professionals felt it was necessary to discuss and define the future of their institution with regard to its societal role, but when asked to specify their ideas about this future and the strategies needed to realise it, there was a lack of consensus about the essence of the future role of archives, museums and libraries, and especially about the means to maintain, increase and reassert their influence.[28]

Given the above, there is a clear gap in the literature regarding self-conceptualization of roles by museum and library experts. This gap strongly directed our research methodology.

[20] HUVILA, Isto. Archives, libraries and museums in the contemporary society: perspectives of the professionals. In: *Proceedings of iConference*, 2014, pp. 45–64.

[21] HUVILA, Isto. Change and stability in archives, libraries and museums: mapping professional experiences in Sweden. In*: Information Research*, vol. 21, No. 1, paper memo 5, 2016. http://InformationR.net/ir/21-1/memo/memo5.html

[22] TONTA, Yasar. Libraries and museums in the flat world: are they becoming virtual destinations? In: *Library Collections, Acquisitions, and Technical Services*, vol. 32, 2008, No.1, pp. 1–9.

[23] PARRY, Ross (ed.). *Museums in a Digital Age*. London: Routledge, 2010.

[24] BEAZLEY, I. et al. Dulwich OnView: An art museum-based virtual community generated by the local community. In: A. Seal, J. et al. (eds.), EV*A London 2010 Conference Proceedings*, Electronic Workshops in Computing (eWiC), British Computer Society, 2010, pp. 79–86.

[25] GIANNINI, Tula and BOWEN, Jonathan. A New York Museums and Pratt partnership: Building Web collections and preparing museum professionals for the digital world. In: MW2015: *Museums and the Web 2015*, Chicago, USA, 8–11 April 2015.

[26] MACEVICIUTE, Elena & WILSON, Thomas D. A Delphi investigation into the research needs in Swedish librarianship. In: *Information Research*, vol. 14, No. 4, paper 419, 2009.

[27] HUVILA, Archives, libraries and museums…

[28] HUVILA, Change and stability in archives…, p. 55

When data from previous studies is non-existent or not available, the researcher cannot rely on quantitative analytics; rather, decision-making is best supported by results stemming from qualitative research. Among qualitative research methods, the Delphi method is widely considered to be particularly suitable in cases where information is limited or conflicting but the issues need to be addressed are complex[29,30]. Although Davenport and Harris[31] suggest that extensive data, along with statistical and quantitative analysis, are the best options for supporting decision-makers in need of short-term predictions for the near future, this is not really applicable to the cultural environment of the Central and Eastern Europe region, including Hungary. Even if past data was available, data-based statistical predictions are trustworthy only if there is a relatively constant environment; when the period of data collection is known to be dissimilar to the past, the role of subjective opinions and "gut feelings" start to gain weight in the forecasting process[32]. One can hardly contest that East-Central European countries, most notably Poland and Hungary, are increasingly diverging from the EU mainstream, and are faced with politico-cultural upheaval. In Hungary, state-maintained institutions using EU funds for development find themselves in a delicate situation that is not comparable to the pre-2010 era, where cooperation between the Hungarian state and the EU was less burdened with national tensions and wartime narratives.

This turbulent environment is especially relevant in connection with meaning-making and the meaning-negotiation of heritage. Public cultural institutions have always been subject to external economic and political pressures. One difference between these two types of external influence is that while economic pressure is well known and widely experienced in the Western world, resulting in the rampant commercialization of public culture, political pressure—which is value-based, state-supported, and aims at social transformation—has been, if not non-existent, then at least somewhat less significant in old constitutional democracies. In Hungary, since the current ruling party, FIDESZ (Hungarian Civic Alliance) won a supermajority in parliament in 2010, it has been possible for value-based decisions in cultural politics to be legitimately (*de jure*) interpreted as the "will of the majority" against which existing constitutional guarantees are rendered powerless. This period can also be considered a turning point in Hungarian cultural policy, as attempts to alter the pre-existing cultural canon (that is, to renegotiate the body and meaning of cultural heritage considered to be of significant importance to the national culture) and introduce a new canon of the "national radical right" (nemzeti jobboldal) became stronger and stronger.

This can heavily influence not only the self-conceptualisation of experts working in cultural institutions and their visions about the future, but also their willingness to report their thoughts and opinions for research purposes, even if provided with complete anonymity. This is, naturally, not a specific challenge of the Central-Eastern Europe region; in the US, as early as the 1970s, it was being debated how a government's interest in knowing what people think

[29] O'FAIRCHEALLAIGH, Ciaran. Public participation and environmental impact assessment: purposes, implications, and lessons for public policymaking. *Environmental Impact Assessment Review*, No. 30, 2010, pp. 19–27.

[30] MCBRIDE, Marissa F. et al. Structured elicitation of expert judgments for threatened species assessment: a case study on a continental scale using email. In: *Methods in Ecology and Evolution*, vol. 3, 2012, No. 5, pp. 906–920.

[31] DAVENPORT, Thomas H. and HARRIS, Jeanne G. *Competing on Analytics: The New Science of Winning*. Boston: HBS Press, 2007.

[32] SAUTER, Vicki L. *Decision Support Systems for Business Intelligence*. New Jersey: John Wiley & Sons, 2010.

about the future may come from its need to identify unacceptable contingencies that might require more control on its part.[33]

Methodology: The public sector and the use of the Delphi method for forecasting

A prerequisite for the chosen method of analysis was that it must be adequate for forecasting trends in community education institutions, museums, and libraries. These institutions serve multiple objectives, and from the viewpoint of the current study exhibit at least three important features:

1. They are sites of socialisation, providing both a frame and content for complex interactive processes that build specific knowledge and behavioural patterns, resulting in individuals becoming socially competent.
2. They are usually public institutions, meaning they are run for citizens, and are either part of a state entity, or the state administration exercises ultimate managerial control over them.
3. They are organisationally hierarchical, which allows accurate identification of decision-makers and the distribution of decision rights across layers (both vertically and horizontally).

These characteristics were crucial in our selection of the Delphi method for analysis. It is used in a wide variety of studies, and is very popular in research on the public sector, where it is mainly used for the purposes of forecasting, communication, budgeting, and goal setting for public policy[34]. In the US, the Delphi method has also been used extensively to engage local communities in education policy making.[35]

First round: Sample selection and gathering preliminary data

The first step was to determine the characteristics of the cultural institution professionals to target for the study. Then a list with names, institutional affiliations and contact addresses of potential participants was complied. Next, preliminary contact was made with the target professionals, asking them to participate in the study. The selected candidates received an invitation in the form of a formal email containing a link to a questionnaire formed of open-ended questions (with the exception of the first one, which asked the name of the respondent's organization). The questionnaire was created using Survey Monkey (www.surveymonkey.com), an online tool for professional use. The link which was emailed to participants remained live for 43 days, from 6 November 2017 to 18 December 2017. Respondents were restricted from accessing the link more than once, and, based on the institutional affiliation given, a manual check after collecting the responses ensured that there were no duplicate answers, and that each answer sheet collected belonged to different respondents.

A total of 142 Hungarian professionals working in cultural institutions were contacted this way, and a total of 59 valid, fully answered questionnaires were received. All completed surveys were entered *ad verbatim* into Microsoft Word, then processed for analysis, including editing for typos. We used QSR International's Nvivo 11 for qualitative thematic analysis, focusing on emerging topics and frequencies.

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Coding and Categorization

Respondents were anonymized; only the type of their institution remained identifiable. We divided the full corpus into various well-defined subsets of texts. This transformation was necessary because the full sample for analysis was not an organic text but its construction was guided by answering specific questions pre-defined by the researcher. These subsets, serving as source documents for the analysis, were constructed from the answers received from professionals, each subset containing all answers given to one question from the Questionnaire. For example, Q2 from the Questionnaire was "What is your opinion about the values and strengths of community development, cultural/community houses/centres, museums and libraries?" and contained all answers to Q2 from 59 professionals, with a unique identifier for institutional affiliation (Q2-LIB1, Q2-LIB2, Q2-MUS1 etc.).

The pre-defined questions partially determined the tree node framework in Nvivo. Main categories (the parent nodes in Nvivo) were fixed, while particular topics emerging from the answers became subcategories (child nodes in Nvivo). Chunks of textual data referring to a particular topic (from now on referred to as "mentions") were coded into the corresponding child node. If one respondent mentioned the same issue multiple times within one answer, that was counted (merged) as one mention, but if they referred repeatedly to the same issue across answers to different questions, that was counted once per question. Individuals were not asked to rank the importance of the issues they raised; thus the data output (number of mentions) is not weighted.

The distribution mentions allocated to all main categories constructed during the first round is as follows (Figure 1).

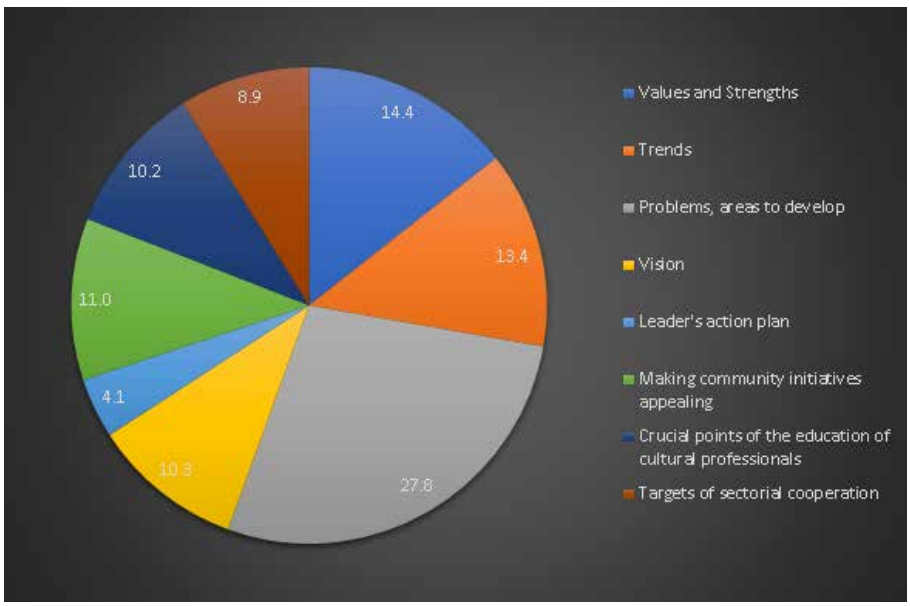

Figure 1: *Distribution of main categories based on item number, in percent*

The questions and categories covered by this study were:

- Values and Strengths: Question 2
- Problems, areas to develop: Questions 4 and 5
- Visions—the ideal future situation in ten years' time: Question 6

Results

The sample contained similar proportions of professionals from the three types of institution covered, with 19 library professionals, 19 museum experts, and 21 from community education institutions.

What are the values and strengths of libraries, museums, and community education institutions?

From the answers received to this question, a priority list was compiled of the main functions and purposes of these institutions, as defined by the respondents. The sub-categories in this list (with a total of 248 references coded) were aggregated to create a consensus-based shared definition that applied across all three types of institution.

Aggregated results for libraries, museums and community education institutions (Figure 2) show which categories respondents considered to be most important when it came to the strengths and values these cultural institutions provide to society:

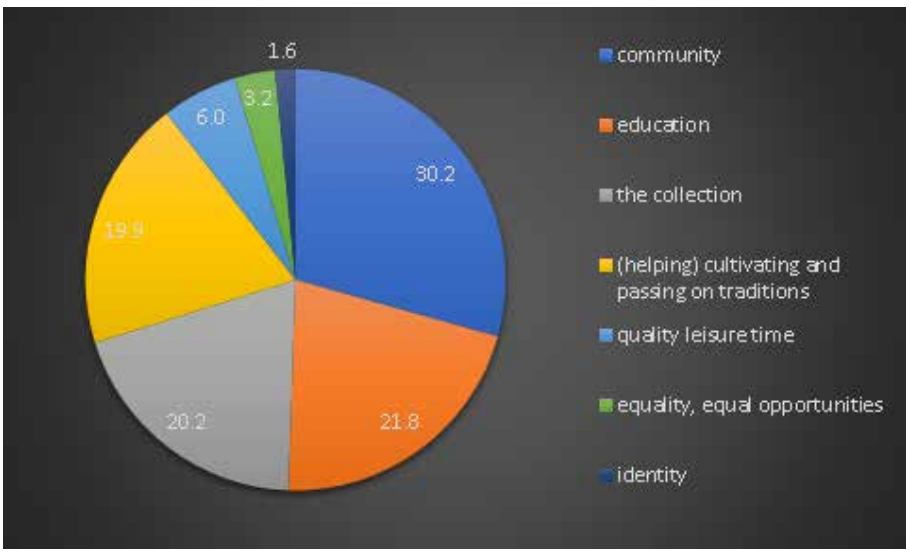

Figure 2: *Relative importance of values and strengths, in percent*

Respondents placed the greatest emphasis on their institution's contribution to the community, with almost one third (30.2%) mentioning this. The second most important value, in the eyes of the surveyed professionals, was their institution's educational value, followed closely by the collection to which their institution provides access. Although providing quality leisure time (6.0%), protecting and nurturing identities (3.2%) and facilitating equality (1.6%) were mentioned, they were not among the most dominant strengths and values respondents associated with their institutions.

These responses show that the most important role of these cultural institutions, according to the experts who work there, lies in their ability to establish and maintain communities. Their

second most important role, beyond protecting and cultivating their own collections, is making them accessible to the wider public. Respondents saw these as the two key elements defining their institution's usefulness to society, which can be manifested both through education and through the passing on of traditions.

There were some differences in the weight given to institutional strengths and values depending on the type of institution. Answers given by community centre professionals diverged noticeably from responses from museum (Figure 3) and library (Figure 4) professionals, the latter pair being more similar to each other. A plausible explanation for this is that while community education centres are "active" cultural institutions, focusing more on interpersonal relations and with relatively small or non-existent collections to exhibit, museums and libraries are repositories of material objects and tend to be active agents only in the process of making these objects available for external consumption when visited by customers—if and when members of the public take the initiative to visit.

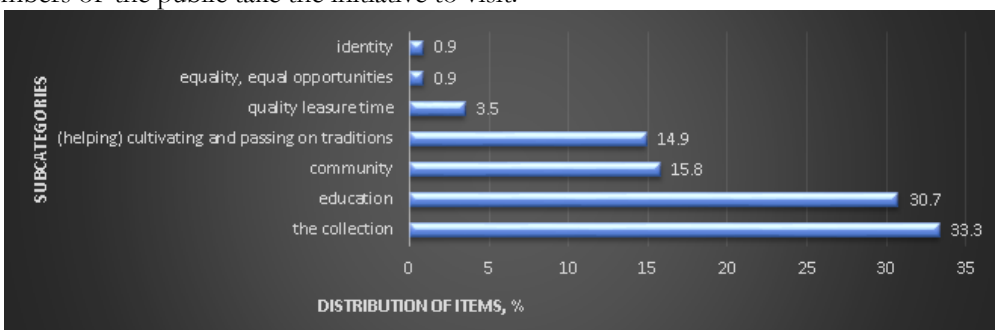

Figure 3: *Relative importance of strengths and values as defined by museum professionals*

A third of museum experts felt that the main values and strengths of their institution relate to its collection (33.3%). Education (30.7%) follows closely, mentioned approximately twice as often as either "community" (15.8%) or "(helping) cultivating and passing on traditions" (14.9%). Other first-level nodes with less significance were also identified: "quality leisure time", "identity" and "equality, equal opportunities" were present with a weight of 3.5%, 0.9% and 0.9% respectively.

The primary functions of libraries are different from museums, but the least prioritized topics (identity, equality and quality leisure time) were the same. Identity was mentioned more often by library professionals than museum experts (0.9% and 3.0% respectively), so it is possible, if respondents' responses reflect a wider societal reality, that libraries have a more important role in cultivating identity within a community than museums do (see Figure 4).

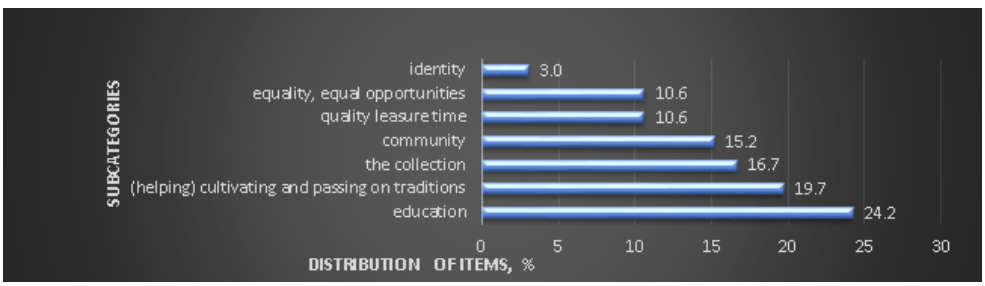

Figure 4: *Relative importance of strengths and values as defined by library professionals*

According to experts that work there, libraries' main value does not lie in their collections—another significant difference compared to museums. The leading function here was seen as education (24.2%) rather than the physical documents the institution keeps in its inventory (16.7%). Libraries' second most important role was felt to be helping to cultivate and pass on traditions (19.7%), closely followed by the collection itself and the institution's community-building functions (15.2%).

As might be anticipated for an active institution (see the corresponding section in the theoretical framework), experts in community education place community-building as their institution's main strength; 69.1% of values and strengths mentioned by this cohort corresponded to the "community" subcategory (see Figure 5). Their second most important role was felt to be helping to cultivate and pass on traditions (17.6%), with respondents placing emphasis on local traditions. "Quality leisure time" was rated more highly in the estimation of community centre workers (5.9%) than museum professionals (3.5%), but not as highly as by library staff (10.6%). Among the three type of cultural institutions, educational functions and the collection received the lowest share here, which can be explained by the fact that community centres do not usually possess a significant number of items to exhibit or loan. To summarise, the main task community education experts feel their institutions fulfil lies in building and nurturing local communities, to keep the member of these communities together.

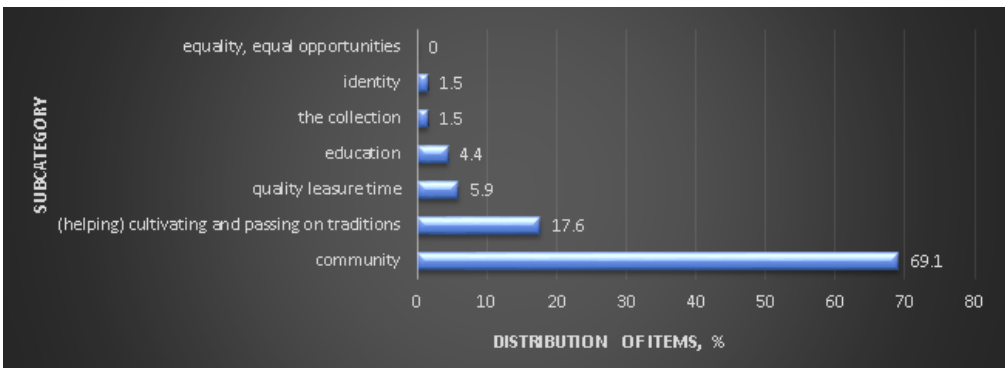

Figure 5: *Relative importance of strengths and values as defined by community centre professionals*

Problems, areas to develop

This main category contains a vast amount of information and it is the largest category of the analysis, with 475 references coded. In spite of being linked to two questions, this category is homogenous since both questions refer to currently existing problems relating to lack or scarcity of resources, and respondents were very focused on these issues in their answers.

The most urgent problems

Patterns emerging during the analysis of problems and areas to develop can be seen in Figure 6:

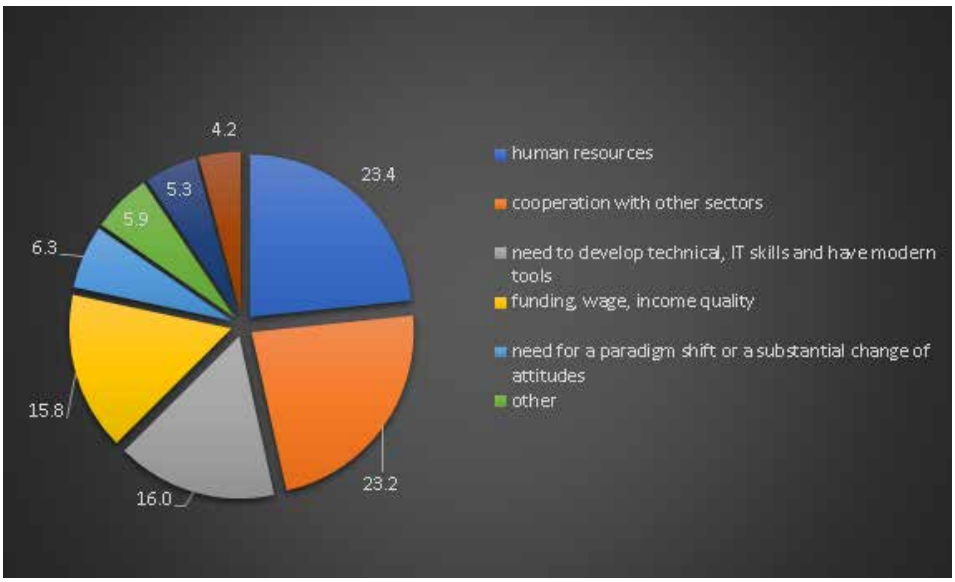

Figure 6: *Problems, areas to develop (distribution, in percent)*

The two main areas of concern to emerge were around human resources (23.4%) and cooperation with other sectors (23.2%). According to the respondents, not just institutions, but the profession as a whole is suffering from a lack of suitably trained staff. Furthermore, it is not only the present workforce that is affected: it is starting to become an issue of potential workforce supply as well. Ever fewer people are choosing cultural fields of work, in decisions which are often made before applying for university courses. People who do choose this field of work often drop out to pursue something else, which, combined with a lack of technical staff, poses an even bigger challenge. The core of the problem can be found in the lack of funding: people who work in this field are underpaid and there are barely any grants for specific programs, projects and events, which means it would basically be impossible to employ the requisite number of people, even if a lack of suitably trained professionals was not a problem. There is a general uncertainty in the sector which comes across strongly in the following quotes:

> "Those working in the field of public collections haven't had a salary raise since 2008, extra pay was introduced in 2017, but that only lasts until November. Due to the outdated salary table, additional money must be assigned to complete the salaries in order to meet the national minimum wage, which is a humiliating situation. Due to the increase of minimum wage in January, the recently graduated workforce's salary won't even reach minimum wage. This is a serious issue that prevents professional innovation and development. The situation in university libraries and private institutions is also very similar."

> "We need a solution to adjust employee salaries as soon as possible because experienced professionals are leaving these institutions."

Another issue was the state of technical equipment and the skills needed to use them properly (16%). This subcategory included all mentions referring to the technical environment—that is, to the presence and accessibility of necessary hardware and software, including its installation in the institution's brick-and-mortar establishment; for example automatic doors, sensors, wall-mounted interactive multitouch display cases, and so on. According to the aggregated answers, even basic technical resources are scarce, with some institutions using decades-old technology. Technicians cannot carry out their work professionally with these outdated tools, which puts cultural institutions at a disadvantage when competing for visitors. Cultural institutions need modern equipment and an adequate workforce; however, this cannot be achieved under current funding models.

Another important area respondents mentioned, giving it similar weight to technical under-resourcing, was issues related to funding, wages and income quality (15.8%).

It is important to note that 42% of the problems raised by respondents were directly related to a lack of resources. Looking at spontaneous mentions, the figure was even higher, at 54%. This means half of the problems mentioned by professionals working in these institutions are directly related to lack of financing and resources. All in all, it is easy to deduct that problems such as a lack of trained staff, poor salaries, out-of-date tools and general underfunding all feed back into a vicious circle of diminishing funds as visitor numbers dwindle. If better funding for the future is not secured, the relevance of these institutions and the number of visitors will continue to decrease, and the mediation of culture will eventually fall into private hands. If that happens, culture will no longer be a basic right for all citizens, but something that only the more privileged can afford.

Other important issues

Although the majority of problems raised by respondents were directly related to lack of resources, there were other issues as well, albeit of lesser importance:

- importance of change of perception and of a paradigm shift in thinking, intellectual modernization
- equal opportunities in society
- lack of marketing

As the replies show, the Hungarian cultural sphere requires a comprehensive change in order to guarantee its success. Changes need to be implemented regarding financial aid and equipment, and the workforce itself needs training to adapt to modern practices. Without these inputs, the existence of cultural institutions is at risk.

Problematic areas by sub-sector

A more nuanced view of problematic areas can be gained by examining the relative weight given to each by professionals from museums, libraries and community centres (Figures 7, 8 and 9 respectively).

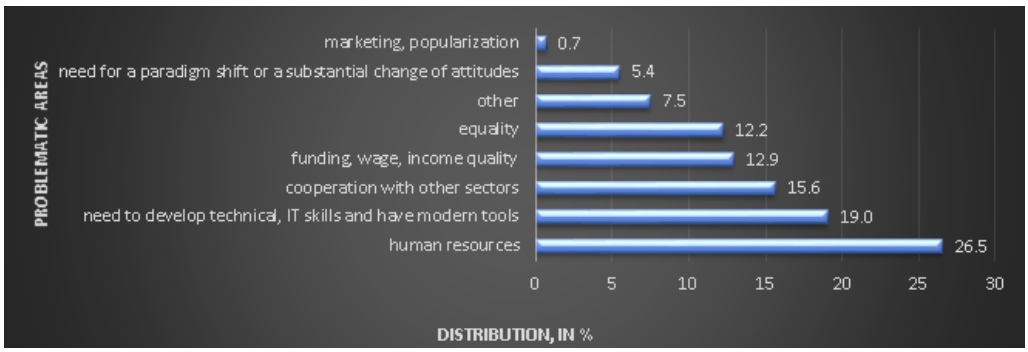

Figure 7: *Areas to address, according to museum professionals*

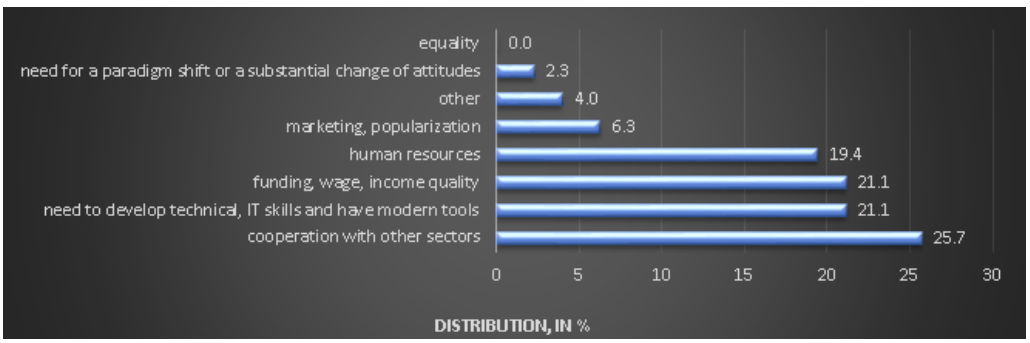

Figure 8: *Areas to address, according to library professionals*

Figure 9: *Areas to address, according to community centres*

The graphs illustrate that the directors of community centres treat obsolescence of equipment as a secondary problem, which is not surprising considering their main task is not presenting books, documents or collections. The digitization of books and the proper storage of priceless artefacts is a more pressing issue for libraries and museums, hence concerns about out-of-date equipment are more common among museum (19.4%) and library staff (21.7%). However, the real issue, particularly for museums and community centres, is the lack of trained professionals in the cultural sector. Finding suitable employees becomes even harder given the need for workers with multidisciplinary skills to fit the complex nature of work within cultural institutions. There is a huge shortage of trained workers, which suggests that these jobs need to be made more appealing in order to attract people to the sector. Financing and salary were among the top four factors mentioned in all institutions.

All in all, directors of all institutional types mentioned a lack of technical resources, a poorly trained workforce and poor finance and salaries, suggesting that these were the three main issues faced in Hungary's cultural institutions in 2017. The last of these – finance and funding – exacerbate the other two problems.

These practical, resource-based problems in museums, libraries and community centres are the most pressing ones, since modernisation and adaptation to the expectations of contemporary audiences cannot happen without suitable investment in human and technological resources. Informants noted that in institutions which are popular and see a high footfall of visitors, you will find underpaid but enthusiastic staff. These places are popular because of the hard work of these unsung, everyday heroes and not because of the system.

> "[C]ertain institutions may be popular compared to others; however, this is because of the individual performance of the directors, employees and their community, not because of the way the system works."

Survey responses also contained politically loaded observations and opinions, some reflecting governmental policy, some responding to (the perceived lack of) governmental competence when dealing with cultural issues:

> "We don't agree with the integrated institution model introduced in 2017 by the government. This was made up by someone sitting in front of a desk in Budapest, without any experience whatsoever. This could seriously DAMAGE the way these institutions work."

The survey generated many similar responses reflecting recent governmental policy changes, regardless of the question being asked.

According to the responses, cooperation in the cultural sphere can be achieved by:

- designing strategies together;
- designing websites and other online interfaces showing the activities and programmes occurring in certain city;
- ensuring that cultural institutions within a city are not in competition with each other by planning programs together and cooperating throughout the year;
- submitting tenders that encourage cooperation;
- using the same advertising spaces, cross-promotion, joint planning of advertising strategies and marketing;
- creating programs, projects, events and workshops together;
- creating a single portal to access multiple institutions' catalogues (e.g. a combined database for all the libraries within a certain area);
- initiating courses and advanced training across institutions, allowing employees to gain insight into their colleagues' work.

These opportunities for cooperation were mentioned several times in survey responses, representing the backbone of the main suggestions for cooperation.

Visions – The ideal situation in ten years' time

Analysis of survey responses revealed two main pathways towards the future highlighted by cultural institution professionals. One related to questions concerning the function of cultural institutions; the other related to operational costs and related factors. These main paths are analysed below as two subcategories of "Vision", further subdivided into topics (T):

SUBCATEGORY 1: Function

Concerning the functions of cultural institutions, visions tended to draw into three topics:

- T1: the institution as a space suitable for sharing time together, as a community centre and a multifunctional public space.
- T2: the institution as a thinktank or a workshop for ideas.
- T3: the institution as a target for tourism.

SUBCATEGORY 2: operational factors, costs

Concerning operational factors and costs, three main topics identified were:

- T1: financial stability
- T2: human resources
- T3: modernization (including digital presence, need for modern infrastructure, equipment etc.)

Regarding a common vision for the future functions of cultural institutions, answers revolved around three possible roles (from a total of 177 references coded):

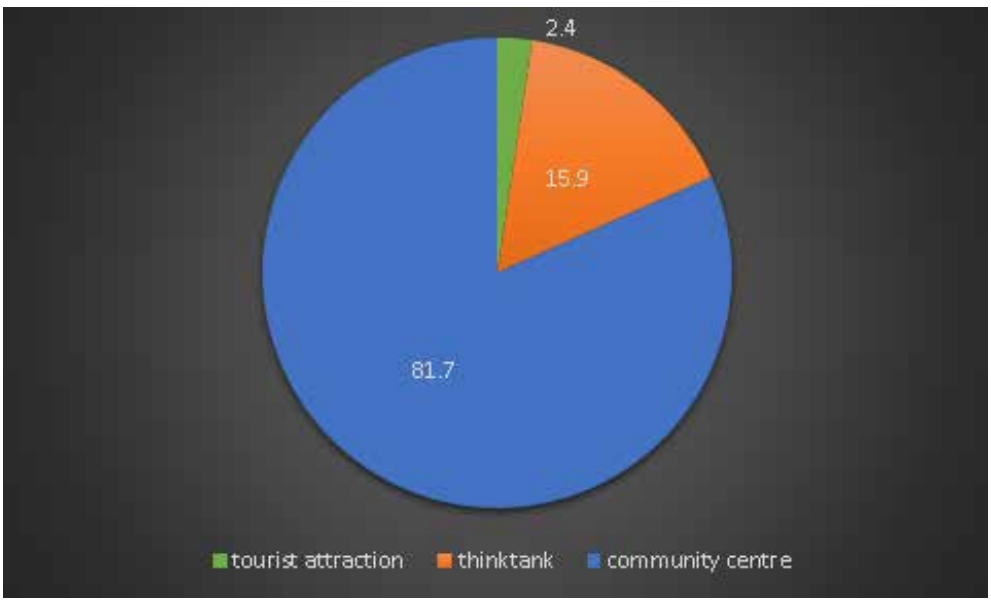

Figure 10: *Visions: what should cultural institutions be in ten years' time?*

Cultural institutions of the future are mostly imagined as a kind of community centre, offering various services for their specific communities. Even when examining responses from library, museum and community centre professionals separately, responses show the same

order of priorities, with minimal difference in weight.

However, the idea that the respondent's institution should be a tourist attraction in the future only appeared among museum experts. Based on the number of coded mentions, experts in museums (8) and libraries (4) were considerably more eager to see their institutions acting as thinktanks in the future than their counterparts in community centres. The "community centre" function was, unsurprisingly, the most important vision for the future of community centres, mentioned 37 times by professionals who worked in one, compared to 21 mentions by museum professionals and nine by library professionals.

In the second subcategory, results from across the sector showed that T3—digital presence, modern infrastructure and equipment, and other thoughts on modernization—received 67.4% of all mentions connected to operational costs (from a total of 95 references coded). More specifically, when asked about the ideal situation for their institution in ten years' time, respondents imagined operating in more modern and better equipped buildings compared to now. Although stable financing was only specified in 4.2% of responses, the other two major visions for the future—technical modernisation and improved staffing—are absolutely reliant on increased funding, so T1 is a more important factor than the actual number of coded mentions suggests.'

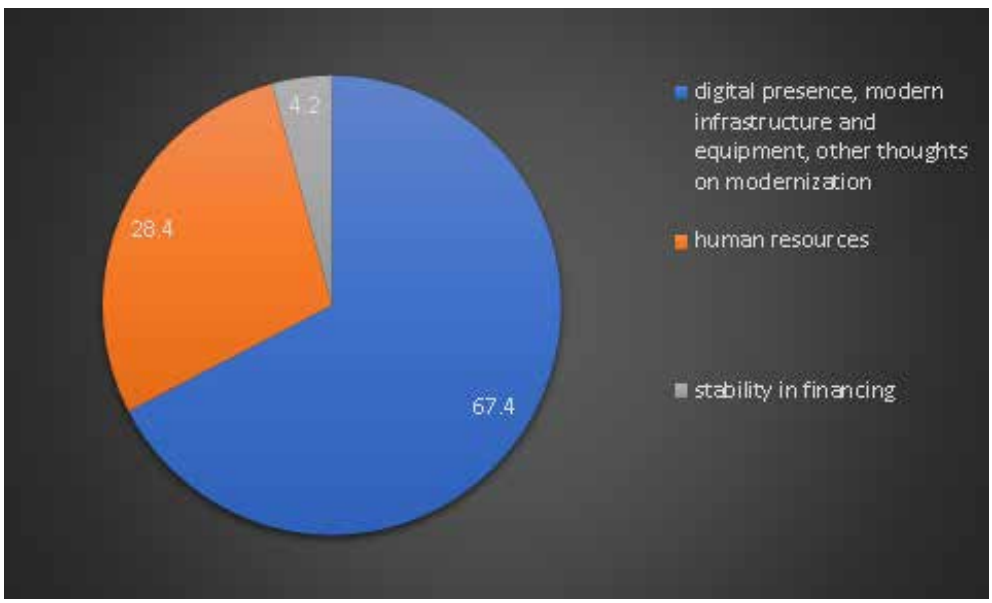

Figure 11: *Visions: Operational factors, costs*

To conclude, it can be said that respondents working in cultural institutions wished for more funding, primarily to upgrade technical equipment and infrastructure, but also to tackle shortfalls in human resources. Respondents expressed a desire for institutions

> "where visitors are greeted by nice, professional people; which are adequately equipped and furnished, according to the standards of the age; where members of the local community, wider or smaller, can enjoy quality time."

Exasperation over the current situation showed itself on several occasions when respondents were asked about their vision for the future, with one expert replying, "Being in the situation we are in, I cannot form such vision".

However, in spite of the general apathy expressed in quite a large number of answers, there was another, more positive vision that emerged from the professionals' responses. This vison was of public space for everyone; a modern, multifunctional intellectual workshop, suitable for all ages; a future cultural institution where people want to spend their free time; an institution capable of building and nurturing communities:

> "It should become a veritable *agora*, a market for urban intellectuals, a meeting point."

> "The elderly should be made aware that libraries are not only for books you can read in your free time. They can learn here how to communicate online with their grandchild, how to use social media, how to gather recipes for Sunday dinner, how to discern between fake news and legit news."

One respondent described their vision of their institution's future as a place that is "Bright, spacious, comfortable, transparent, and loved." Another felt their institution

> "should remain similar to the current one, be an open, extroverted organization, able to react to changes, to initiate changes, not living on routine work, an organization where spaces keep their modern feeling, and their infrastructure makes it possible to provide twenty–first-century services and support, [rather than] emanate a pitiable retro feeling."

Summary

In this study we have presented what Hungarian community centre, library and museum professionals think about the values and strengths of their institutions, what problems they are aware of and focus on, and how they envisage their institution's future role in society. The results presented here are not to be considered as final, but will be used to construct the second-round questionnaire in which these answers, together with the answers to other first-round questions not analysed in this study, will be summarised and formulated into a series of more specific questions.

The main contribution of the current study was to identify consensus and dissensus in what experts think about the values, strengths and problems of their respective institutions, and how they see the future of their institution ten years from now. One major area of consensus related to finances and funding, with professionals across the board identifying this as the ultimate barrier to the proper functioning of their institution. In particular, respondents expressed an urgent need for reform with regards to human resources, staff training, and the modernisation of infrastructure, to avoid a serious decline in visitor numbers. Visions for the future of cultural institutions centred around their role as spaces that bring people together to share ideas and build shared communities.

Until cultural institutions receive the support they need to bring about these developments, positive results remain tied to the commitment of individual staff members, often underpaid, who sacrifice their own time and energy, fuelled only by their enthusiasm and sense of duty. As one respondent said:

> "The answer is simple. Put your heart into it (even when you're significantly underpaid)!"

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Franz Beranek and his activities in Slovakia[1]

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Franz Beranek and his activities in Slovakia
This paper deals with the research of Prof Franz Josef Beranek focused on the so called "Habans", a social religious group that settled in western Slovakia. This research is reconstructed according to the so called German Archive, which forms a part of the scientific collections of the Institute of Ethnology and Social Anthropology of the Slovak Academy of Sciences. The first part is focused on the life of Franz Beranek and his research on the Haban community, including the history, the linguistic situation, and comparisons to other Anabaptist groups. The second part deals with the procedure of cataloguing the archive and its history, structure, and issues.

Keywords: Habans, Franz Josef Beranek, Anabaptists, The German Archive, Mennonites, Hutterites, Third Reich, Dialect

Although Franz Josef Beranek is not one of the leading names in the world of academia and is not very well known at the other end of the moral spectrum, as a Nazi academic, his work has gained a permanent place in German linguistics and, as I will point out in this article, also in Slovak ethnology.

Franz J. Beranek was born in 1902 in today's Břeclav. He attended (from first to fourth year) the German People's School, which he later considered to be the key event in the forming of his own sense of national belonging. He graduated from the German grammar school in 1920. He entered the German Technical University in Brno, but later moved to German and Slavonic studies in Vienna (1921) and in 1923 he switched to the German University in Prague. After defending his doctoral thesis,[2] he graduated as a Doctor of Philosophy in 1932. Until the 1940s he worked as a secondary school teacher.[3] In his academic interest, Beranek focused on researching German dialects (where he also included the Yiddish language) in the environment of German minorities abroad, but was also interested in ethnographic topics. From 1926 to 1928 he lived in Břeclav and, under the influence of growing German nationalism, devoted himself to public education and journalism. Despite his "Germanhood", he was tied to his home in South

[1] This article was supported by the project Folklore, folkloristics and ideology, VEGA 2/0107/19 (2019 – 2022).
[2] *Die deutsche Mundardt von Südmähren (Vocalism)* (German dialects of South Moravia [Vocalism]).
[3] PANCZOVÁ, Zuzana. Pôsobenie Franza J. Beranka na Slovensku v 30.a 40. rokoch 20. storočia: výskum „Huncokarov"a InstituAt für Heimatforschung. In: *Ethnologia Europae Centralis*. Trnava: 2017, p. 26.

Moravia, and much work is devoted to this area. It was during this period that he visited the German enclaves in various parts of Czechoslovakia, including the Huncokars. German ethnographers working at the German University in Prague considered the studying of German enclaves an important part of German ethnography in Czechoslovakia.[4] Most of his research trips in Slovakia (to visit Huncokars[5]) took place in 1928. In his works from this period he drew attention to the disappearing German settlements and called for protection against assimilation into the Slovak majority. His most important work of this period is "Die deutsche Besiedlung der Westslowakei" (German Settlement of Western Slovakia; Beranek 1943). In 1941 Beranek was installed as a lecturer for the German Homeland Association in Slovakia.[6] The material from the research carried out in Slovakia became part of the archive fund of the *Institut für Heimatforschung* in Kežmarok (IHF). Its operation was inaugurated on 22 March 1941. The IHF's aim was academic as well as educational activities for the benefit of the German minority along the lines of the Third Reich's cultural institutions, towards the unification of the German population throughout Southeastern Europe.[7]

Beranek was initially active as a scientific adviser, and later as the head of the language research department. This department dealt with the documentation and creation of a card register of German terms in the Slovak language, German settlements in Slovakia, and German historical documents and dialects. In its report, the *Institute für Heimatforschung* mentions research on the Huncokar and Haban communities, drawing attention to the collaboration of Beranek with his wife, Hertha Wolf-Beranek, in the study of already defunct German settlements. The plans of this department reveal works on the dialect of the Bratislava area, the dialect of Huncokar settlements, the dialect of the Haban community, and a detailed description of German surnames. A detailed list of the German names of all Slovak municipalities was in the process of preparation, and was intended for the needs of the *Deutsche Partei*. Since the beginning of its activities, it had been clearly defined that the scientific data collected and archived by the association would be used not only for academic but also for practical purposes.[8] At the turn of the years 1943 and 1944, the Beranek's activities in the IHF in Kežmarok came to an end after a conflict with Johann Lipták (leader of the IHF) and the couple returned to the Protectorate, to the town of Děčín. An interesting link between the activities of the Beranek family and Slovak ethnology is the fact that Hertha-Wolf, in collaboration with her husband, drafted an opinion on the work of Rudolf Bednárik,[9]

[4] LOZOVIUK, P. (ed).*Etnicita a nacionalismus v diskursu 20. století*. Brno: 2012.

[5] Lumberjacks of German and Austrian descent living in the Small Carpathians.

[6] HUTTON, CH. *Linguistics and the Third Reich: Mother Tongue Fascism, Race and the Science of Language*. London: 2014, p. 213.

[7] SCHVARC, Michal. „Kulturraub" alebo záchrana kultúrneho dedičstva? Evakuácia archívov a kultúrnych pamiatok nemeckými orgánmi zo Slovenska koncom2. svetovej vojny. In: *Muzeológia a kultúrne dedičstvo,* vol. 1, 2013, No. 1, p. 77.

[8] PANCZOVÁ, Pôsobenie Franza J. Beranka... p. 30.

[9] Leading Slovak ethnologist, considered one of the "founding fathers" of Slovak ethnology. In his research and publishing activities he devoted himself to folk architecture and housing, folk art, folk customs, and employment, as well as Slovaks abroad. His work constitutes a special proof of an important stage in the development and formation of Slovak ethnology. He has published 18 monographs, eg. Spiritual and Material Culture of the Slovak People (In: Slovenská vlastiveda, 1943), Folk Tombstones in Slovakia (1949), Painted Fireplaces in the Small Carpathians (1956), Slovaks in Yugoslavia (1964), Folk Architecture in Kysuce (1967), Slovakia (1972), and over 70 expert studies and articles. He participated in the education of a whole generation of Slovak ethnologists. Bednárik, Rudolf [online]. Encyclopaedia Beliana, ISBN 978-80-89524-30-3. [Cit. 2020-03-31]. Available on the Internet: https://beliana.sav.sk/heslo/bednarik-rudolf

Slovakische Volkskultur (Slovak Folk Culture), in which she reproaches the author for not taking into account the influence of "Germanhood" on Slavic and Slovak culture.[10] Towards the end of the war, Beranek fled back to Germany, but during this escape, most of his work (and probably part of the archive mentioned here) was lost. He reconstructed it with limited success. After his death, his wife Hertha Wolf-Beranek was to continue this project. After the war, he went through a denazification process and started to work at the university again. However, his position was complicated, some of his colleagues considering him a "Nazi scientist" despite denazification and refusing any cooperation, but for good reason. He joined the NSDAP only in 1938 (later defending himself by stating that it was due to professional pressure), but was also a member of the paramilitary SA (Sturmebteilung), and his wife Hertha Wolf-Beranek was a member of Ahnenerbe and SS organisations. He profited from the Nazi regime. He worked his way up from secondary school teacher to associate professor at Charles University in Prague in 1944. In his defence, it may be noted that Max Weinreich does not mention him in his publication *Hitler's Professors*, which can only suggest that he did not consider him a sufficiently important "academic-criminal". Beranek also tried to make contacts with Jewish scholars in his post-war career through his interest in Yiddish. All of this would indicate that Beranek was more opportunist than a convinced Nazi.[11]

Franz Beranek and the "Anabaptist Question"

The name "Habans" in Slovakia refers to members of the social-religious movement of Anabaptist groups (neo-Baptists). In the following lines I will briefly discuss the prevalent views on the origins and ethnicity of the Habans.

The emergence of neo-Christian movements was a direct consequence of the Reformation. More precisely, the Anabaptists were among those of the radical reformist wing, which criticised the reformist movement. In 1524, supporters of this wing met at a meeting in the city of Zurich and asked the authorities for an open dispute with the preachers of the city, where they wanted to act as a new church in public. They proclaimed the need for baptism in adulthood and the implementation of Bible-based social principles in life, bringing them closer to the first Christian communities and achieving a higher degree of moral and religious excellence. In 1525, this public dispute ended with the defeat of the Anabaptists and the declaration by the city council for the obligatory baptism of children. Opponents of this order could leave the city and the country with their families and property. The gradual migration of Anabaptists led them through neighbouring countries, especially the territory of the German states, Tyrol, and Italy.[12]

Anabaptists came to Moravia under the leadership of Baltahazar Hubmeier, who settled in Mikulov and founded a printing house through which he spread his teachings and ideas of Anabaptism. On the direct order of the imperial court in Vienna he was arrested and executed by burning as a heretic.

The consolidation of Anabaptism as a social movement in Moravia was largely due to Jakub Huter, who enforced common ownership, and a radical condemnation of private ownership as the greatest sin against God. Some Anabaptists disagreed with this radicalisation, and two opposing groups were formed. Followers of Huter began to be nicknamed the Huterites. The

[10] PANCZOVÁ, Pôsobenie Franza J. Beranka..., pp 32–33.

[11] KALMAN, Weiser: "One of Hitler's Professors": Max Weinreich and Solomon Birnbaum confront Franz Beranek. In: *Jewish Quarterly Review* 108, 2018, pp. 106–124.

[12] KALESNÝ, František and SZABÓ, Tibor. *Habáni na Slovensku.* Bratislava: Tatran, 1981, pp. 13–15.

contradictions deepened and repressions by the state and Catholic Church intensified. Huter was burnt in 1536. The Moravian aristocracy, however, used the knowledge and diligence of the Anabaptists despite the reluctance of the royal court. However, the pressure intensified and, on the direct order of the emperor (through Cardinal Dietrichstein), the Anabaptists of Moravia were expelled under pain of death. The core of the Anabaptist movement thus shifted to the Kingdom of Hungary, to the territory of present western Slovakia.[13]

The next fate of the Habans was grim: the Thirty Years' War and the Ottoman-Habsburg wars left great damage on brothers' courts. Over time, the Habans switched to a private farming system and were re-Catholicised and merged with the native population. Some of these groups emigrated to Transylvania, from there to the territory of czarist Russia, and later to the American continent.[14]

In spite of the unity of this group at first glance, it cannot be stated that it was a homogeneous group or a group of common origin. The establishment of groups in Slovakia was continuous. Anabaptists of Tyrolean descent made up the the core of the Haban communities, but the chronicles also mention those of Bavarian, Swabian, Swiss, Silesian, Hessen, Rhine, and even Italian, Moravian and Slovak origins. The social status of the Habans (not being vassals of the king and having a higher standard of living) also ensured the supply of members from the ranks of the domestic population.[15]

In view of the fact that the research interests of Franz Beranek were mainly linguistic, it is appropriate to look at some etymological theories about the word "Haban", as the neo-Baptists were referred to by the majority of the Slovak population.

The etymology of the word "Haban" is unclear, but there are several theories. The most commonly mentioned theory is the so-called German origin theory, predominantly citing derivation from the word "*haushaben*".[16]

Other opinions claim that this is a garbled version of the word "*hannoveraner*" (Hanoverian).

The Habans, however, did not use this name, and considered it disrespectful at best, and offensive at worst. However, this word has already penetrated literature and has also become a toponym. In 1810, Alojz Medňanský formulated the theory that the Anabaptists had also brought a distinct dialect— "*Plattdeutsch*" (a group of North German dialects, a mixture of dialects spoken in their homeland). This theory has been repeated several times. In the 1930s Oto Haban, a descendant of Haban immigrants, explored the dialect area and found it bounded by the confluence of the rivers Moravia and Myjava. On the left bank of river Myjava this name is used very little, suggesting that it was not a widespread word for this group, and that it became generally known later.

Other opinions derive the name from the word "*Hofan*", i.e., a resident of the court or an Anabaptist (anabtan).[17]

It can, however, be stated that the word Haban is purely Slovak, because the first written record in Slovakia is from 1667. The most probable seems to be the theory of Bratislava city archivist Ovídius Faust, according to which the word Habán comes from the word "*habat*"

[13] KALESNÝ and SZABÓ, Habáni..., pp. 16–18.
[14] KALESNÝ and SZABÓ, Habáni..., pp. 77–92.
[15] KALESNÝ and SZABÓ, Habáni..., p. 46.
[16] ČERNOHORSKÝ Karel. *Počátky habánskych fajansí*. Opava, 1931, s. 7.
[17] KALESNÝ and SZABÓ, Habáni..., pp. 8–12.

or "*zhabat*" (meaning to confiscate) and it refers to people who have had their property confiscated, which often happened to Anabatist groups.[18]

There is also a relatively exotic theory of etymological interpretation by Gustav Weiss, who derived this name from the Hebrew "*ha-banim*", meaning the true children of God, who the Anabaptists thought themselves to be, but as I mentioned, the term Haban was perceived as offensive. At the present time, this word is generally accepted and has no negative meaning.[19]

This brief linguistic and historical excursion was necessary in order to understand what led Prof. Beranek to be interested in the Habans. In the following lines I will analyse the structure of the Haban part of the scientific collection known as the "German Archive" and try to reconstruct the course of the research of this socio-religious group. When we look at the existing digital catalogue, we find that the documents can be divided into the following six categories:

1.) Questionnaires for dialect research (*Mundartlicher Fragebogen*)—mainly focused on terms from botany, zoology, architecture, agriculture, and family terminology. The questionnaires have a uniform structure, each box containing the word in standard German and dialectological examples. In case it was necessary to find out several names of individual parts of the object, the questionnaires also contain a picture of the object. Questionnaires are filled only to a small extent.

2.) Correspondence—mostly answers to Franz Beranek's letters from various researchers in the field of Anabaptist groups.

3.) Excerpts—bibliographic data on literature related to Habans and Anabaptists in the world. Both domestic (Slovak and Czech) and foreign publications are present.

4.) Dialectological notes—this is the most extensive part of the Haban part of the archive, unfortunately scientifically almost worthless because of the lack of data on the location of dating and etymology of the term.

5.) Library cards—books mostly from the then Slovak University in Bratislava, whose lender was Franz Beranek.

6.) Topographical names (*Ortsnamen*)—contains topographical names mostly from the Záhorie region. The vast majority of toponyms are in German with marked pronunciation, but Slovak names of municipalities are also present.

I will now analyse the correspondence in detail, which is the most content-relevant. Franz Beranek's interest in the Habans was primarily linguistic, trying to record the dialects spoken by these groups of the population. A cross-section of the archives proves the preparation for and the start of such research, but it is unclear whether Beranek also underwent field research and visited the sites mentioned in his archive. However, this is not excluded because, demonstrably, he underwent an expedition to the Huncokars in the Little Carpathian Mountains and the Haban settlement was not so far away.

Beranek contacted other researchers in the field of Anabaptism, in particular the Austrian philosopher and historian, Robert Friedmann (1891–1970), with whom he continued a lively correspondence (from 1932 to 1933). Beranek was particularly interested in the Anabaptist

[18] FAUST Ovidius. *Zo starých zápisníc mesta Bratislavy*. Bratislava: Universum, 1933 p. 176.
[19] KALESNÝ and SZABÓ, Habáni..., p. 12.

communities on the American continent, especially the Hutterites in Canada. Friedmann wrote to him:

> I don't think any profits will come from correspondence with the Huterite brothers in Canada. The brothers do not communicate with foreigners very much and their answers are usually short and unpleasant. They are against pure science (and in your case they are very suspicious). They only allow historical research to illuminate their past. But you can try your luck and write.[20]

Friedmann gave valuable advice to Beranek about the resources, advising him who to contact or which institutions to visit for research. Beranek also asked about the situation regarding Anabaptists in Transylvania (*Siebenbürgen*), but he received an answer that the communities were there, but that they had probably already assimilated. He wrote that he knew nothing about the situation in Ukraine, but that it was possible that there were remains of these settlers.

However, he also provided him with knowledge from his own research and study trips. He also describes his visit to Veľké Leváre:

> During my visit, I spoke to an older woman who spoke an old "habanian dialect", which is almost lost, and I noticed the word "erchtag" or "Iritag" for Tuesday (Dienstag). This is really a word from the old Germanic collection.[21]

In Beranek's texts, published in the 1920s and 1930s, he explores romantic ideas of language and nation and expresses a strong need to draw attention to the protection of the disappearing German settlements against assimilation into the ethnic majority.[22]

Obviously, Beranek tried to get samples of all the dialects that these Anabaptist groups could speak. There is no direct correspondence between Beranek and the Anabaptist communities (anywhere) in this archive collection, suggesting that they refused cooperation.

Friedmann assisted him both in this research, sending him publications about the Anabaptists in the USA and Canada, and in the correspondence he himself led with these communities (again with warning that the "profit" from them would be low). However, Friedmann strongly reminds him not to forget to return them, as he archives all letters. Studying the old Hutterite manuscripts could bring him greater benefits.[23]

Apparently, Beranek urged for contact to be made with the Anabaptist communities, because in the next letter of 1932 the following answer is given:

> Addressing the brothers in Canada would make no sense, because I know that brothers are very secretive unless they feel special religious interests or historical research. They have less understanding for linguists. Of course, the brothers are very closely related to the Mennonites, they are actually part of them, namely the Communist part, and they are in direct contact with the relatively strong Mennonite Church.[24]

[20] German archive IESA SAS, *V – Habanerisch* – 1932, Vienna, Robert Friedmann, document no. 9.
[21] German archive IESA SAS, *V – Habanerisch* – 1932, Vienna, Robert Friedmann, document no. 9.
[22] PANCZOVÁ, Pôsobenie Franza J. Beranka..., p. 27.
[23] German archive IESA SAS, *V – Habanerisch* – 1932, Vienna, Robert Friedmann, document no. 10.
[24] German archive IESA SAS, *V – Habanerisch* – 1932, Vienna, Robert Friedmann, document no. 11.

Friedmann also advises him to contact official institutions such as the Mennonite historical society in Goshen, Indiana, USA.[25] However, this correspondence is missing from the archive, so either it did not happen at all, or the institution did not respond to the letter.

Concerning the Hutterite linguistic research, he suggests contacting Dr Eberhard Arnold, the leader of the Hutterite Brotherhood in Germany. Other researchers Friedmann recommends contacting are: Berta W. Clark, who had lived for four weeks between brothers in Canada; and Dr Macourek and Dr Novotný, both of whom had published in the *Věstník učené společnosti* (Bulletin of the Scholarly Society; 1929).

Interesting also is the development of the relationship between Beranek and Friedmann. In early letters Beranek is addressed "Dear (honoured) Professor" (*Hochverehrter Herr Professor*), then in the next few letters "Dear Colleague" (*Sehr geehrter Herr Kollege*) and then in later letters Friedmann addressees him "Dear friend" (*Lieber Freund*).

Friedmann also sent Beranek the words he discovered to aid him in building his expertise, and almost every letter concludes with a wish for research success and adds how he looks forward to publishing the results.

In the following letter from 1933 there is also an interest in ethnographic topics:

> I also must thank you for the beautiful photographs that once again reminded me of the dear houses, their cleanliness and internal order. They are indeed symbols of the population, at least from the past.
> The fact that there are still remnants of the Habans in Levars, also remnants of their former community life, is remarkable. When I was there in 1925, I met only a few "remains" which is a great pity.[26]

Photos of Haban ceramics are also mentioned, but again these are missing from the archive collection. The letter also mentions the name of a family who emigrated from Sobotište to Canada. Friedmann complains in his letter that his work is stagnant and that his publishing options are limited.[27]

On the issue of Anabaptism in south-eastern and eastern Europe, Beranek made less effort to obtain data. There are only two letters in the archive concerning this. The first is from Prof Viktor Schirminsky, who describes the colony of Huttertall in Ukraine near the town of Melitopol. At the same time, however, he adds that its inhabitants moved to Canada and that today there are only the remains of a former colony.[28] For more information, he recommends studying literature, namely Alexander Klaus—Our Colony of Odessa (Unsere Kolonien Odessa, 1887)—or contact the German Foreign Institute—Deutsches Ausland Institut Stuttgart. Beranek did so and received a brief reply:

[25] It is still a functioning institution, founded in 1924. It is dedicated to promoting Mennonite/Anabaptist history and the everyday life of this community. Source: https://mennonitehistoricalsociety.org/about/ accessed 25 September 2019.

[26] German archive IESA SAS, *V – Habanerisch* – 1932, Vienna, Robert Friedmann, document no. 12.

[27] The letter is dated June 1933. In January of that year, Adolf Hitler became the chancellor of Germany, and it is likely that it alludes to a change of circumstances. The situation was complicated because Friedmann was of Jewish origin.

[28] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Viktor Schirminski, document no. 7.

> We inform you that the Communist sect of the Hutterites lived in Romania until 1770 and in southern Russia between 1770 and 1774. Then they emigrated to the USA (South Dakota and Montana) and to the prairie provinces of Canada. So you will not find Hutterites to have been in Romania since 1770 and since 1874 not even in southern Russia. The followers of the Hutterites, called Habans, enjoyed special religious privileges and still live in Sobotište and the Veľké Leváre, but they are now members of the Roman Catholic Church. Whether they have retained their Hutterite identity, is beyond our knowledge.
> In 1926, a fraternal communist settlement was established in Germany near the town of Fulda under the leadership of Dr Eberhard Arnold and in 1930 they formally joined the Hutterite sect.[29]

It is likely that sometimes Beranek received contradictory information, as was made possible by the fact that most of the data was based on theoretical research, real usable material being scarce. Beranek tried to fill this gap by contacting every researcher who had merely mentioned the word Haban somewhere. The proof is listed in a letter from the Czech art historian Václav Vilém Štech, where he explains that he did not deal with the Habans and their faith and that the article Beranek had taken interest in "was improvised on the request of the editorial board, not supported by scientific studies" and was "pure journalism, without scientific ambition."[30]

The only real field research report comes from Johann Winter, who visited Sobotište and sent a report to Beranek briefly describing the functioning of the Haban court:

> I won't tell you anything new; once a year, a week after the festival of the Three Kings, they have a meeting, all members of the fraternity are the owners of the Haban courts, 40 board members select the head of the board and two senior officials. The following festivities will be held on January 12 at the Brotherhood's guest house.[31]

In addition to the social order, he also briefly comments on the Haban dialect:

> The inhabitants of Sobotište know almost nothing, they speak only a little German, almost no "Haban"at all. Only one older man had the courage and said "Gackerle" instead of an egg (Eier), and that is the only Haban word I have heard here.[32]

The letter also mentions that he had also sent a copy of the sixteenth century Haban chronicle, that the original had allegedly been stolen with a copy made by the local priest, that the mayor might have had interesting information, but that he didn't want to show anything. Regarding Veľké Leváre, it is mentioned here that:

[29] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Heinz Kloss, document no. 48.
[30] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Václav Vilém Štech, document no. 49.
[31] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Johann Winter, document no. 51.
[32] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Johann Winter, document no. 51.

> The Veľké Leváre are interesting; until recently there were German schools. I recorded some Haban words: – Tuesday (Dienstag) – "Erchtig", Friday (Freitag) – "Pfingstig, Apron (schürze) – "Huter", Shirt (hemd) – "Pfad", Chimney sweep (Kaminfäger) – Kemetschore, Ich werde gehen – Ick wer kai.[33]

Beranek received another piece of serious scientific material from Bertha W. Clark, explaining in detail the differences between German and the dialect of the Hutterites. Although they came from Switzerland, their dialect was different from Swiss German: "hearing the two Hutterite brothers talking reminds her as if someone wanted to talk with a hot potato in his mouth".[34]

Clark states that the dialect of the Hutterites copied their migration route, using words of French origin, and many Russian words (especially the older generation, the younger almost not understanding them).

Another impact was the integration of Mennonites into the Hutterite community during their stay in Russia, but their migration lines were different, across the Netherlands, Denmark, and Prussia. They brought many "*Platt-Deutsch*": "One of the preachers told me that he has to control himself during sermons, otherwise he would talk in Platt-Deutsch".[35]

The communities in Sobotište and Leváre are also briefly mentioned: "I know that the Catholic descendants of the Hutterites live in Sobotište and Leváre. I know that one of the community houses built in the eighteenth century still stands. Have you established contact with these groups?"[36]

The letter contains more comprehensive interpretation of the dialectological specifics; a complete quotation is beyond the scope of this article, but Clark admits that she cannot name the differences between the groups because they will not be great, if they exist. She recalls that there are currently 3 groups and 26 colonies on the American continent. There are more significant differences in social culture (e.g., in choosing a spouse) or in clothing (using buttons or hooks on shirts).[37]

The last letters of the correspondence consists of two letters which are, however, substantially later in date (1943). The first is from Associate Professor Herbert Grau, who sends a brief dictionary of Habanic terms from the Great Levars to Beranek and explains their origin.[38]

The very last letter is just a brief report about the occurrence of two Haban courts in the town of Pezinok.[39]

Origins and characteristics of the scientific collection the "German Archive"

Because the material analysed is only a part of a much larger collection known as the "German Archive", it is appropriate to briefly describe it. The collection is part of the scientific collections of the Institute of Ethnology and Social Anthropology of the Slovak Academy of Sciences, which was established in 1953, the archives being built as a necessary part of the workplace, containing text, pictorial, and multimedia documents. The origin of the fund, called the German Archive, has not been sufficiently clarified. Most of it comes from the work

[33] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Johann Winter, document no. 51.
[34] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Bertha W. Clark, document no. 53.
[35] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Bertha W. Clark, document no. 53.
[36] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Bertha W. Clark, document no. 53.
[37] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Bertha W. Clark, document no. 53.
[38] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Herbert Grau, document no. 55.
[39] German archive IESA SAS, *V – Habanerisch* – 1932, Sudak, Johann Weinzierhl, document no. 57.

of the Beranek family in Slovakia in the so-called Institute for Homeland Research (*Institut für Heimatforschung*) in Kežmarok, and partially probably also from collections of the German Carpathian institute in Kežmarok (*Karpatendeutsches Institut in Käsmark*). The Carpathian Institute in Kežmarok was founded in 1941 and its ambition was to develop ethnographic research among the Carpathian Germans, as well as cultural and ideological work with this minority.[40]

With the changing situation on the front, to the detriment of the Third Reich, the activities of this institute ceased. Efforts to move and destroy archival records have led to part of the fund being lost or destroyed. How this fund got into the scientific collections of the Institute of Ethnology and Social Anthropology is subject to debate and unverified rumours. A former academic of the Ethnographic Institute at that time, Associate Professor Emília Horváthová (employed 1951–1975) stated that these materials were found in the hangar at Piešťany airport after the Second World War.[41]

Apart from the occasional research interest of the employees of the then Ethnographic Institute and the Museum of the Carpathian Germans, this archive collection was intact. There were several reasons why nobody tried to process it for so long: unclear origin, the (apparent) absence of any inventory or index, and the difficulty of composition and completeness. Last but not least, many documents were very difficult to read, being written in gothic German script, archaic manuscript, or damaged.

The first attempt was made in 2011, when a researcher at the Institute of Ethnology and Social Anthropology of the Slovak Academy of Sciences, Mgr. Zuzana Panczová, PhD, in her research on an ethnic group of German lumberjacks in the Little Carpathians called Huncokari by the majority, processed thirty archival units from the section *Slowakische Volkserzählungen* (Slovak Folk Tales), dated 1930–1932. It emerged that these sources were directly linked to the research of German enclaves, which German ethnographers had been actively interested in, and this research had later been subordinated to the political objectives of the Third Reich.[42]

In 2018, employees of the Institute of Ethnology and Social Anthropology of the Slovak Academy of Sciences proceeded to catalogue the archive and discovered a report written by Svetozár Švehlák and Milan Leščák in 1966, stating that the state of the archive did not correspond to that of 1943 and that it was most likely a private archive only supplemented by IHF research. Most of the collection is composed of dialectological and folkloristic material classified by topic and questionnaires, marked with Roman numerals. However, there are also fragments of research of folk medicine, architecture, viticulture and, of course, exclusively private material—personal correspondence.

The Haban part of the fund is marked "V". In the report it is briefly characterised as follows: "Another part of the materials consists of linguistic (dialectological) collections, which are mostly untranscribed and unsorted, e.g., from the Haban research."

This characteristic, as the authors themselves, admit, is considerably superficial, because only the Haban part contains other materials in addition to direct research questionnaires and notes. Since there is no other catalogue of this archival collection apart from the cursory list of file folders marked by Roman numerals, employees of the Institute of Ethnology proceeded to catalogue it within an academic project: "History of Ethnology in Slovakia in the 20th Century: Ethnological Research of the German Minority". However, as I pointed out, many are damaged,

[40] LOZOVIUK, *Etnicita...*, p 17.
[41] PANCZOVÁ, Pôsobenie Franza J. Beranka..., p. 35.
[42] PANCZOVÁ, Pôsobenie Franza J. Beranka..., p. 24.

unlabelled or mislabelled, or absent. In short, when the fund came into the possession of the Institute of Ethnology, it was incomplete and in a catastrophic state, which was undoubtedly due to its movements in turbulent times. The aim of processing therefore remains to explore the fund and create a catalogue that will allow its further scientific processing.

As the collection is thematically and genre diverse, it was necessary to develop a registration system that would allow the cataloguing of documents that have no name or have a supporting character (notes, excerpt cards). An electronic catalogue is currently being built, where the following items are recorded for each document:

1. Signature of the file—the original signatures that are listed in the report from 1966 by Svetozár Švehlák and Milan Leščák. In cases where the file does not have a number, this signature is assigned chronologically after consultation with other project solvers (to avoid double numbering and subsequent confusion in cataloguing). The Haban file is marked with a Roman numeral "V".
2. Title of the file—listed if it exists, in this case with the name "Habans".
3. Author of the document—first surname and then name.
4. Serial number of the document within the file—assigned by the worker who catalogues the document in chronological order.
5. Original signature of the document—to be indicated if the document has such signature. This information is used for later accurate identification of the document if it is linked to another document in another file. Part of the files are broken (or incomplete) due to the difficult circumstances of the acquisition of the fund, and this signature is intended to assist in their identification (and possible completion).
6. Document title in the original language—only stated if the document has a title.
7. Dialect—with regard to the scientific focus of Professor Beranek, it is also necessary to indicate the dialect in which the document is written. This information is provided only if the dialect can be identified with certainty.
8. Title of the document and translation—if the document has a title, it shall be stated in the Slovak language; if not, the researcher may assign a concise title according to its content at their discretion.
9. Document genre—this entry is only included in cataloguing if the genre is unambiguous, e.g. "fairy tale".
10. Document dating—stated only if the document is dated or can be dated from another related document.
11. Regesta—the researcher briefly describes what the document is about or what it discusses. In cases where the researcher has assigned the title of the document because it did not exist, the description may be identical to that title.
12. Municipality—the historical name of the municipality from which the document originates is stated in the German language.
13. Municipality, present name—the current Slovak name of the municipality from which the document originates or to which it refers.
14. Country—current state in which is the municipality from which the document originates or concerns. This information is provided in the Slovak language.
15. District—the current district, or territory that includes the municipality mentioned in the documents. In the case of foreign municipalities, the district may be replaced by another

geographical specification (county, republic, region, etc.), but this must be specified. This is an additional indication that specifies the localisation in the event that there are municipalities with the same name.

16. Note—this will include any other relevant information concerning the document, e.g. discrepancies, illegible passages, or reference to related documents.

17. Interesting fact (optional)—it is possible to mention or emphasise any particularity or interesting fact of an individual document which could be of interest to other researchers (e.g. the signature or stamp of an important person, the order for a significant historical event, etc.)

So far, this is an electronic cataloguing scheme that can be changed (or supplemented) with continued cataloguing, as it is not yet fully known what the fund contains.

Conclusion

The original inspiration to write this contribution to the study of Habans was the fact that at least in Slovakia this chapter is closed. The Habans either emigrated or merged with the majority and all that still catches the attention of scholars is Haban ceramics, whether in terms of art, museology, or ethnography. If we look at the efforts of Franz Beranek to collect and create a dialectological atlas of German enclaves and if we understand this as an experiment, I must say that it failed.

The reason for this was that what he was trying to prove simply did not exist.[43] The bearers of the language died out and it is therefore impossible to say that the Habans in Slovakia used a single dialect. It is much more likely that it was a set of different but related dialects. The theory of original, pure German has also proved to be misleading, which Beranek himself reflects in his work:

> Caution should be exercised when assigning the names of the Haban immigrants who came to our territory in the sixteenth and seventeenth centuries. There are many forms of place names found in the books of this sect or in the dialects of the remaining Habans in the Veľké Leváre and in Moravský Svätý Ján, apparently taken directly from the mouth at a given time, though often only as used by a minority of the existing medieval German population" In addition, their script contains many young or new, many times only superficially Germanised names of Slovak and Hungarian towns, which were hardly the common property of all speaking in the Haban dialect, because in most cases they can no longer be proved. For the sake of completeness, these forms of names, if the city is listed for other reasons, are listed together. In addition, we are given in writing some nice German-sounding, at first glance truly antique-like names of cities, which, although perhaps only in connection with a foreign form, were discovered by the Habans: Freischütz (Sobotischt; probably based on the Hungarian szabad "frei"), Neusorg (unclear whether Katow, Holitsch/Holíč, Popudin/Pobedím or Brodsko).[44]

[43] This was a quite common result of scientific projects and expeditions in the Third Reich due to their subordination to political goals.

[44] BERANEK, Franz. Die deutsche Besiedlung des Preßburger Großgaus. Munchen, 1941, pp. 13–14.

The main asset of Beranek's research remains at least a brief documentation of the linguistic and ethnographic remnants of the Habans in Slovakia and their comparison with similar communities abroad. However, it is still an open question and cataloguing of this archive is still ongoing and it is possible that further processing will bring new knowledge in this area.

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The extinction of the Ukrainian culture of the Polish-Ukrainian-Slovak borderland and the image of the "Ukrainian Banderite" in Polish and Czechoslovak literature, journalism and cinematography, mid-1940s–1980s

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The extinction of the Ukrainian culture of the Polish-Ukrainian-Slovak borderland and the image of the "Ukrainian Banderite" in Polish and Czechoslovak literature, journalism, and cinematography, mid-1940s–1980s
The aim of this study is to outline the process of the extinction of Ukrainian culture in south-eastern Poland as a result of Polish resettlement actions and the activities of the Ukrainian underground movement (i.e., the Ukrainian Insurgent Army) in the post-war period (1944–1947). Concurrently, the study offers an analysis of the image of the "Ukrainian Banderite", created by propaganda in Polish and Czechoslovak literature, journalism, and cinematography in the period from the mid-1940s to the end of the 1980s. The authors state that both in Poland and in Czechoslovakia the analysed topic has been subject to certain cyclical waves of interest, or current political demand or usefulness, but always according to an established and politically accepted template. The black-and-white reception of the issue, propaganda fictions, the concealment of facts, and the disproportionate highlighting of others, which were applied in the literary and film production of the real-socialist period, only distorted the historical objectivity of the issue and created a complicated stereotype in the collective memory.

Keywords: Ukrainians in Poland, Polish-Soviet resettlements, Operation Vistula, Ukrainian Insurgent Army, image of "Banderite", propaganda, literary and film production of the real-socialist period, stereotypes of the collective memory

Introduction

Only a few kilometres from the Slovak border on the territory of adjacent Poland (northeast of the Dukla Pass, or east of Barwinek) is the unique open-air Museum of the Lemko Culture in Zyndranowa. Yet in the far and wide surroundings there is no longer the continuous Lemko (Ukrainian) settlement which once existed here. This extinct unique culture is now

only commemorated by annual cultural festivals (such as a Lemko bonfire among others). The Lemkos (an ethnographic sub-group of the Ukrainians in Poland) were to share the fate of the broader Ukrainian minority in Poland—deportation. Taking place in the first years after World War II as a result of Polish-Ukrainian antagonism and the desire to establish an ethnically homogeneous Polish state without national minorities, in the case of the Lemkos specifically this displacement was from their home region of Lemkivshchyna in south-eastern Poland to the territory of Ukraine and northern and western Poland.

The founding of a Lemko museum was initiated in 1968 by Teodor (Fedor) Gocz, who was a manager of the museum until his death in 2018.[1] His aim was to preserve the culture of the Lemkos that had lived in these places until 1947. Gocz's fate was to reflect that of Ukrainians in Poland. Although his family avoided resettlement to Soviet Ukraine and deportation during Operation Vistula, as the resettlement operation was called, Teodor himself (when he was 18 years old) was arrested in June 1947 and accused of "sympathising" with the Ukrainian Insurgent Army (UPA [we use this original abbreviation in this paper], or the so-called Banderites), tortured, and finally sentenced to prison. He was released in 1951 and only in 1954 did he return to Zyndranowa to the house of his great-grandfather, Teodor Kukiel (who due to his being 80 years old had not been deported). Subsequently, he began activities related to the resurrection of the Ukrainian culture in the region. For this activity he was again arrested and sentenced to three years in prison in 1958. After his second return from prison, however, he again became engaged in the promotion of the Ukrainian culture and folklore, and subsequently he founded the Memorial Room of Lemko Culture in a house of his great-grandfather. This act started his museum-making activity and also the long process leading to the establishment of the museum. He collected objects related to the history and culture of the Lemkos, as well as monuments from the battle in the Dukla Pass in 1944. With his own resources he built a memorial to the participants in this battle, but for the Ukrainian title and militant character of the work he again came into confrontation with the communist government in Poland. The memorial was blown up in 1976 and Teodor Gocz faced persecution once again.[2] In 1999 he published a memoir, *Life of Lemko*, describing his life.[3] Undoubtedly, his fate and the history of his open-air Museum of the Lemko Culture in Zyndranowa could form the object of a special study (even on the Slovak version of *Wikipedia* there is an absence of articles on him and his museum).

This present study, however, aims to demonstrate a wider scope of the issue than the outlined fate of that one important Lemko cultural actor. The attentive reader will not have missed the fact that Gocz was persecuted in communist Poland for his belonging to the Ukrainian ethnic group and for his activities reviving the Ukrainian culture. This study's aims, however, are: to outline the process of the extinction of the Ukrainian culture in the Polish-Ukrainian-Slovak borderland (in south-eastern Poland) as a result of displacement actions and the operation of the Ukrainian Insurgent Army (UPA) in the post-war period (1944–1947); and to analyse the propaganda image of the "Ukrainian Banderite", first in Polish literature, journalism, and cinematography, and subsequently in the Czechoslovak ones (from the mid-1940s to the late 1980s), because the issue of the resettlement of Ukrainians and the activities of the Banderites

[1] On the Ukrainian museums see SHNITZER, Igor. Museum Affairs at the Territory of Subcarpathian Rus' in the Years of the First Czechoslovak Republic (1919–1938). In: *Muzeológia a kultúrne dedičstvo*, vol. 7, 2019, is. 1, pp. 99–110.

[2] *40 rokiv Mezeju lemkivskoji kul'tury v Zyndranovij*. Lviv 2009, pp. 3–12.

[3] GOCZ, Teodor. *Życie Łemka*. Zyndranowa 1999.

also resonated in Czechoslovak literary and film production (a part of Polish literature also being "imported"). In other words, we shall try to point out a very interesting phenomenon whereby the components of the material cultural heritage of the majority society (and non-democratic regime), together with the use of propaganda tools, create an image of an enemy minority culture and thus contribute to creating a complicated stereotype in the collective memory.

Discussion and results

In 1944, the communists in Poland were faced not only with the problem of taking over and strengthening their power, based on the support of the Soviet Union, but also with the question of the future Polish-Soviet border. It was obvious that the outcome of this issue would depend on the will of the Soviet leader Joseph Stalin, who fully controlled the Polish communists. When they thought about power, and that was their main goal, they agreed on far-reaching concessions to the Soviet state, including on the question of Poland's eastern border, which in principle had "shifted" Poland to the west. On 26–27 July 1944 the Polish National Liberation Committee (PVNO), as the representative of the communist government in Poland, agreed in secret with the Soviet government to redesign the Polish-Soviet border. It was agreed to set the borderline along the so-called Curzon Line with small deviations in favour of Poland. Obviously, it was at that time that the idea of resettling Poles from the USSR, and of displacing the Belarusians, Lithuanians, and Ukrainians from Poland, was born. In September 1944, the PVNO signed resettlement agreements with the partially Soviet Union republics: Belarus, Lithuania, and Ukraine (the so-called "Lublin Agreements"). There is no doubt that the person who had initiated these agreements was Stalin, who cared about creating an ethnographic border between Poland and the USSR. He probably wanted to put before the Western Allies the final result and to gain their approval for the new course of the border. With the change of borders, Poland also adopted the idea of an ethnically homogeneous state (due to what they considered their negative experiences with minorities during the interwar and war periods), and purged the two largest minorities. On the newly acquired western (formerly German) territories began the resettlement of Germans (about 7 million) and on the eastern parts, that of Ukrainians (about 700,000). At the same time almost 800,000 Poles were resettled from the USSR (i.e. from the territory of the former eastern Poland).

The resettlement of Ukrainian nationals from Poland to the USSR, specifically to the Soviet Ukraine, began on 15 October 1944. At the beginning (in the so-called voluntary phase), families which had lost property or relatives due to the transition of the front and the Polish-Ukrainian conflict were resettled. Also many of those who were worried about their future life in Poland were moving east. On the other hand, poor people were attracted by Soviet propaganda presenting non-existant welfare in a new place of settlement. It is estimated that by December 1944 only about 20,000 people had resettled.[4] However, most Ukrainians were not interested in resettlement and wanted to stay in their homeland. Despite some governmental measures at the end of 1944, the voluntary resettlement almost came to a halt, and some Ukrainians even began to flee back to Poland. The cruel truth about the drastic situation in the USSR—news of post-war hunger, collective farms, injustice, and problems with the local population of Ukraine—also came to the people.

[4] PISULIŃSKI, Jan. Przesiedlenia Ukraińców do ZSRR w latach 1944–1946. In: *Biuletyn Instytutu Pamięci Narodowej*, 2001, nr 8, p. 38.

In early 1945, the Polish government proceeded to begin coercive actions, which due to the approaching deadline for resettlement hardened (initially, it was to have been implemented by February 1945, and then the deadline for resettlement was postponed). In the first half of 1945, people living in the area of south-eastern Poland were frightened of the looting of Ukrainian villages, realised by criminal groups and armed sections of the Polish underground movement. Last but not least, there were murders and a terrorisation of the population (it is estimated that in the first months of 1945, between 2,600 and 3,900 Ukrainians were murdered in 75 municipalities).[5] Nor had the many petitions and requests asking for protection and addressed to government authorities helped. In some cases, the population even recognised masked Polish security officials—militiamen and soldiers—among the members of criminal groups.[6] The Ukrainian population, in turn, used all means to avoid resettlement—by changing nationality and proclaiming loyalty to Poland, creating militia, escaping into border forests, or crossing the Czechoslovak borderline.[7] This position did not change until the end of the resettlement. Resistance by the Ukrainians caused the government to start their forced displacement from Poland, which was also in line with the mood of a part of Polish society and some representatives of local authorities in this area.[8] By September 1945, over 220,000 Ukrainians had been resettled.[9]

On 3 September 1945, the 3rd, 8th, and 9th Infantry Divisions of the Polish Army were sent to south-eastern Poland to displace Ukrainians (the so-called forced phase of resettlement). Security authorities also recommended the resettlement of mixed families, unless the father was a Pole.[10] The army relocated entire villages and gave the villagers only two hours to prepare for departure. Resettlement actions were often accompanied by violence and cruelty from the army. "At the time of these operations", says Polish historian G. Motyka, "the army fired at everyone who ran. And they ran ... just everyone! Soldiers looted possessions, beat the population, in some places raped women, and burnt dwellings."[11] Such behaviour certainly did not apply to all soldiers and their commanders. For example, while the chief of staff of the 5th Military District, Brigadier General Adam Daszkiewicz, recommended that "the army should treat all Ukrainian men as bandits, should take them away, and even shoot some of them",[12] on the other hand, the commander of the 5th Military District Division, General Mikołaj Więckowski, urged officers to "put an end immediately to all atrocities and the abuse of the innocent civilian population of the Rzeszów Voivodeship".[13] In practice, the behaviour of the troops depended on the attitude of the commander conducting the action, as well as on the individual attitudes of ordinary soldiers.[14]

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[5] MOTYKA, Grzegorz. *Tak było w Bieszczadach. Walki polsko-ukraińskie 1943–1948*. Warszawa 1999, pp. 239–241.

[6] HALCZAK, Bohdan. Łemkowszczyzna w latach 1944–1947. In: *Pivdenyi arxiv (istorychni nauky)*. Vyp. XVI. Cherson 2004, p. 278.

[7] On the issue of Ukrainians fleeing to the territory of Czechoslovakia, see: ŠMIGEĽ, Michal. K otázke lemkovských utečencov (z Poľska) na Slovensku v rokoch 1945–1946. In: *Forum historiae*, 2009, vol. 3, is. 1, pp. 133–149.

[8] Archiwum Ministerstwa Spraw Wewnętrznych i Administracji (AMSWiA), f. Polski Komitet Wyzwolenia Narodowego (PKWN), sygn. 6.

[9] PISULIŃSKI, J. Przesiedlenia Ukraińców do ZSRR..., p. 39.

[10] AMSWiA, f. Ministerstwo Administracji Publicznej (MAP), sygn. 134.

[11] MOTYKA, Grzegorz. *Tak było w Bieszczadach*..., s. 285.

[12] *Repatriacja czy deportacja. Przesiedlenie Ukraińców z Polski do USRR 1944–1946. T. 2. Dokumenty 1946*. Pod red. E. Misiły. Warszawa 1999, dok. 40, pp. 93–95.

[13] Op. cit., dok. 146, p. 289.

[14] Op. cit., dok. 168, pp. 333–334.

Unfortunately, the pressure and coercion, which caused injustices to the civilian population, had one more negative effect. A Ukrainian underground arose to defend the displaced population. As early as 1945, the Ukrainian Insurgent Army's military staff moved part of their forces from western Ukraine to south-eastern Poland. The ranks of the UPA were also strengthened by men from the local Ukrainian population, who decided to defend their fatherland with rifles in their hands. In this way, the UPA forces increased considerably. While in the spring of 1945 there were 4–5 sotnias of the UPA in Poland (a *sotnia* = about 100 insurgents), in May 1946 their number increased to 16–17 sotnias.[15] The displacement of the Ukrainian population meant a real problem for the UPA: the loss of a civilian presence and communication channels with the West was putting its further activity in this area under question. Therefore, the UPA command adopted measures to protect the civilian population against the invasion of the army and Polish robber groups, or to prevent the displacement of people. Eventually, these measures allowed its activity even after the removal of a significant part of the population.

The UPA units paralysed communication routes, blew up bridges and railways, set traps, and attacked Polish military and security forces. They attacked resettlement offices and transport stations[16] and carried out propaganda and agitation activities.[17] In October 1945, an open letter "To the whole civilised world" was drafted and translated into several languages, informing the international community of the tragic situation of the Ukrainians in Poland.[18] These steps caused a large part of the Ukrainian population to start perceiving the UPA warriors as defenders of their lives and property. On the contrary, Poles perceived them as bandits and criminals. Unfortunately, the actions of the Ukrainian underground led to the brutalisation of the Polish force structures and the region of south-eastern Poland found itself in a terrible situation. The Ukrainian civilian population was in the midst of a struggle between the UPA and the Polish army. However, due to a clear prevalence of the Polish military force, the activities of the Ukrainian underground and the resistance of some of the population could not prevent the displacement; at most they could only delay it.

Nearly 479,000 people were resettled into the USSR between 15 October 1944 and the end of June 1946.[19] Despite the official termination of the process of resettlement, individuals and families could still resettle, because the final term was the end of 1946. About 10,000 people took advantage of this opportunity.[20] As a result, between 1944 and 1946, a total of 489,000 Ukrainians from Poland were largely forcibly resettled into Soviet Ukraine.[21] However, this was not the end of the idea of the clearing of south-eastern Poland of its Ukrainian population. In the region were still about 200,000 Ukrainians.

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[15] MOTYKA, Grzegorz. Od Wołynia do akcji "Wisła". In: *Więź*, 1998, nr. 3, pp. 123–126.

[16] AMSWiA, f. Ukraińska Powstańcza Armia (UPA), sygn. X/40.

[17] See: DROZD, Roman. *Ukraińska Powstańcza Armia. Dokumenty – struktury*. Warszawa 1998, pp. 158–206; WYSOCKI, Jasek. *Ukraińcy na Lubelszczyźnie w latach 1944–1989*. Lublin 2011, pp. 62–74.

[18] AMSWiA, f. Organizacja Ukraińskich Nacjonalistów (OUN), sygn. IX/4.

[19] *Deportacji. Zachidni zemli Ukrajiny kincia 30-ch – początku 50-ch rr. Dokumenty, materiały, spohady. T. 2. 1946–1947 rr*. Lwiw 1998, dok. 43, p. 173. See also: Centralne Archiwum Wojskowe (CAW), f. Sztab Generalny WP, sygn. IV.111.480; CEPENDA, Ihor. *Ukrajińsko-polśki widnosyny 40-50-ch rokiw XX stolittia: etnopolitycznyj analiz*. Kyjiw 2009, pp. 119–203.

[20] *Deportacji..., T. 2*, dok. 43, p. 173; SZCZEŚNIAK, Antoni B., SZOTA, Wiesław Z. *Droga do nikąd. Działalność Organizacji Ukraińskich nacjonalistów i jej likwidacja w Polsce*. Warszawa 1973, p. 231.

[21] For further details concerning the fate of Ukrainians from Poland resettled to Soviet Ukraine, see: KABACZIJ, Roman. *Wygnani na stepy. Przesiedlenia ludności ukraińskiej z Polski na południe Ukrainy w latach 1944–1946*. Warszawa 2012.

In February 1947, further displacement of the Ukrainian population began, this time to the western and northern regions of Poland, from where the original German population had been displaced. Its realisation was planned for the autumn of 1947—immediately after the harvest of Ukrainian farmers.[22] However, on 28 March 1947 near the village of Jabłonka in the Bieszczady Mountains, in unexplained circumstances, Karol Świerczewski, the assistant minister of national defence, was assassinated. The government immediately attributed this crime to the Ukrainian underground, although it had no evidence. His death was so mysterious that even special commissions established for this purpose could not identify the perpetrators.[23] Finally, this event was to become an ideal excuse for the process of deportation.

Pict. 1: *Propaganda photograph.*
Source: BATA, Artur: *Bieszczady w ogniu*. Rzeszów 1987, p. 142.

From that moment on, preparations for the deportation action were sped up. Polish society also began to be convinced of the exceptional personality of Świerczewski. On the one hand, the legend of "a general who did not bow to the bullets" began to spread, and on the other hand, obloquy of the Ukrainians started. In a commentary published in *Życie Warszawy* the death of Świerczewski was commented upon in this way:

"He fell at the hands of Ukrainian fascists. We know these hands. They are the hands of the "SS Galizien Division". Even those of the Brigade of Kaminski. The same ones that murdered 200,000 Poles in Volhynia. The same ones which murdered the women and children of the Warsaw Uprising. The ones which burnt and destroyed the defenceless capital of Poland. The ones which ruthlessly awakened the exiles of Wola and Starówka at night and were looking for sacrifices for her bestiality".[24]

[22] See: DROZD, Roman. *Polityka władz wobec ludności ukraińskiej w Polsce w latach 1944-1989*. Warszawa 2001, pp. 66–68.
[23] For more details, see: HALCZAK, Bohdan. Tajemnica śmierci generała Karola Świerczewskiego. In: *W kręgu polityki*. Eds. A. Ilciów, R. Potocki, R. Kessler. Zielona Góra 2010, pp. 140–148.
[24] Życie Warszawy, 29. 03. 1947.

The commentary contained false information. The Ukrainians were denoted as fascists, and accused of participating in the suppression of the Warsaw Uprising, of the murders of Warsaw citizens, and for the excessive number of Polish victims in Volhynia. The Ukrainian character was also quickly bestowed upon the purely Russian Kaminski Brigade. Unfortunately, this propaganda was so effective that similar statements can still be found today. There was a strong call for revenge for the death of Świerczewski. J. Wasilewski, for example, appealed thus on the pages of *Dziennik Ludowy*: "The remnants of Ukrainian fascist groups have remained. They must be removed in the most radical way. The death of General Świerczewski must be avenged as soon as possible!"[25]

Pict. 2: *Propaganda photograph.*
Source: *Siedem rozmów z generałem dywizji Władysławem Pożogą, I zastępcą ministra spraw wewnętrznych, szefem wywiadu i kontrwywiadu. Rozmawiał H. Pecuch*, Warszawa 1987, p. 189.

"Correctly-directed" films began to be made, and special-purpose photographs were taken that "featured" the captured members of the Ukrainian underground movement or their supporters (see photos nr. 1–2). In particular, the murders of Poles committed by the UPA warriors were promoted "out loud". The government encouraged the organisation of numerous gatherings in towns and villages, at workplaces, offices, and schools, which called for the establishment of order and the "extermination of the bands".[26]

In fact, the Ukrainian underground movement did not pose a real threat to Poland and its communist authorities. As a result of the fighting with the Polish Army and Soviet NKVD

[25] *Dziennik Ludowy*, 31. 03. 1947; KMITA, Małgorzata. Propaganda antyukraińska i kształtowanie negatywnego stereotypu Ukraińca w czasach PRL. In: *Problemy Ukraińców w Polsce po wysiedleńczej akcji "Wisła" 1947 roku*. Pod red. W. Mokrego. Kraków 1997, p. 60.

[26] ŁACH, Stanisław. Osadnictwo ludności ukraińskiej na ziemiach odzyskanych po II wojnie światowej. In: *Akcja "Wisła" na tle stosunków polsko-ukraińskich w XX w.* Pod red. J. Farysia i J. Jekiela. Szczecin 1994, p. 158.

troops in 1947 the UPA had only 1,500 soldiers[27] and about 500 armed members of the civilian militia.[28] The Polish army command was aware of this. In February 1947 the commander of the 8th Division operating in Bieszczady wrote to the Minister of National Defence, M. Żymierski: "

There is a relative peace in the area. On roads and railways, which in the first half of 1946 could not be used without special military protection, transit is taking place normally today, without fear of possible bandit attacks. The area is under the control of the military and security authorities, and the groups of bandits that sporadically appear in the south and southeast border zone are still being tracked and destroyed by our troops".[29]

The death of Świerczewski undoubtedly accelerated the intention to displace the Ukrainian population from its residential area near the Slovak and Ukrainian borders. Primarily it was aimed at the Ukrainian minority and only secondly at the UPA. At the meeting of the Politburo of the Central Committee of the Polish Workers' Party on 29 March 1947, when a political decision was taken to deport the Ukrainians, repressive measures against the Ukrainian population were clearly spoken of, not the fight against the UPA. The Ukrainian underground movement was not mentioned at all.[30] The discussion centred around an initial deportation plan called Operation East. Only during the discussion was it decided to emphasise that the aim of the deportation action was not only to displace the population but also to destroy the UPA. The course of Operation Vistula (Polish: "Akcja Wisła") also clearly indicates that it was concentrated mainly on the displacement of the population. The number of troops to be deployed in the operation was estimated on the basis of the number of villages from which Ukrainians were to be displaced, not on the number of the existing UPA units.[31]

On 24 April 1947, the Presidium of the Council of Ministers of Poland approved a resolution concerning Operation Vistula. Four days later, the Vistula Operation Group, specially created for this purpose, began to deport Ukrainians to areas of western and northern Poland.[32] From a military point of view, this action went smoothly. At dawn, the army surrounded the villages and ordered the inhabitants to prepare for the journey, giving them only two hours to pack and take the necessary things with them. Then the people were escorted by the army to collection camps, where people from several villages were being gathered together. From there they marched to loading stations, where the deported were divided into groups (mixed such that members of a group were not from one village) and transported by train under the supervision of the army to various places in western and northern Poland. For the future rapid assimilation envisaged in the plans, people were resettled in different parts. It is estimated that more than 140,000 people were deported in Operation Vistula (April–July 1947). Resettlement continued in the following months. Overall, 150,000 Ukrainians were deported to the north-west of Poland, including almost 4,000 people dismissed from the Jaworzno concentration

[27] MISIŁO, Eugeniusz. Ukrajinci u Polszczi (1944–1947). Heneza akcji „Wisła". In: *Ukrajina i Polszcza miż mynułym i majbutnim*. Upr. A. Pawlyszyn. Lwiw 1991, p. 13.

[28] MOTYKA, Grzegorz. *Ukraińska partyzantka 1942–1960. Działaność Organizacji Ukraińskich Nacjonalistów i Ukraińskiej Powstańczej Armii*. Warszawa 2006, p. 588.

[29] *Akcja „Wisła". Dokumenty*. Opr. E. Misiło. Warszawa 1993, p. 22 (wstęp).

[30] Archiwum Akt Nowych (AAN), f. Komitet Centralny Polskiej Partii Robotniczej (KC PPR), sygn. 295/V-3.

[31] *Akcja „Wisła". Dokumenty*. Opr. E. Misiło. 2. wyd. Warszawa 2012; *Polska i Ukraina w latach trzydziestych – czterdziestych XX wieku. T. 5. Akcja „Wisła" 1947*. Warszawa-Kijów 2006; SNYDER, Timothy. Rozwiązać ostatecznie problem ukraiński w Polsce, 1943–1947. In: *Nowa Ukraina*, 2007, nr 1–2, pp. 15–41; OLCHAWA, Maciej. Akcja „Wisła": motywacje czystki etnicznej. In: *Nowa Ukraina*, 2007, nr 1–2, pp. 43–49.

[32] See: PISULIŃSKI, Jan. *Akcja specjalna „Wisła"*. Rzeszów 2017.

camp (officially: Central Labour Camp).

Operation Vistula was also accompanied by army brutality. Certainly, violence was not a permanent part of the deportations; the brutality rate rather depended on the attitude of the commander and soldiers who participated in the action. Nevertheless, the propaganda spread among them encouraged the use of violence. In the prepared materials entitled "Hitler's Heirs" and "Fighting the Bands is our Soldier's Duty", the UPA members and Ukrainian "assistants" were described as robbers, fascists, and murderers of the Polish population. According to them, Banderites were used by the Germans for particularly bloody pacifications and they were famous for their brutality in suppressing the Warsaw Uprising.[33] The "Field Guide to the Soldier" warned that "the bandit is generally not different from the ordinary person the soldier will meet".[34] The above statements were intended to consolidate the image of the "Ukrainian Bandit" in the minds of the soldiers. This aim was also supported by the image of a Ukrainian, disfigured by the propaganda, who was portrayed as an "armed, dirty, and unshaven individual" in contemporary photographs and films (see photos nr. 1–3).

In a leaflet entitled "Against the Deceived Members of the UPA", rebel commanders were called "servants of bloody Hitler, former SS-men and police", and in the leaflet "To the local People", the blame for displacement was put on the UPA and the population itself: "Ukrainian villages became natural nests of bands, sowing fear and violence".[35] As Krystyna Kersten rightly points out, the deportation of the Ukrainian population from south-eastern Poland "

has resulted in hardly quantifiable material losses—the depopulation and devastation of the Bieszczady region, and huge moral damage. The specific culture of the Polish-Ukrainian border was practically destroyed. The brutal methods of mass forced displacement, intended to solve the "Ukrainian problem" in Poland, had a negative impact on the consciousness not only of the deported Ukrainians, but also of the Poles. After all, it did not solve the "problem", it only further complicated the already complicated relationships".[36]

The displacement of the Ukrainian population and systematic counter-insurgency actions greatly weakened the UPA and, as a result, it dissolved in Poland. Weakened sotnias from the *kuren* (battalions) Bajdy and Rena left for Soviet Ukraine or they tried to escape (through Czechoslovakia) to the West as early as June 1947. Similarly, in August 1947 sections of the Zalizniak battalion left Poland. In September the Berkuta battalion was dissolved. Some of the dissolved insurgents and their families were displaced to the north-western regions of Poland. In south-eastern Poland, only a small group of guerrilla warriors remained to secure illegal channels of communication between the West and insurgents in Ukraine.[37] The heads of command of the Ukrainian underground movement in Poland were also annihilated. In October 1947, OUN's regional head, Jaroslav Starukh, shot himself in a bunker that was surrounded by men of the Internal Security Corps, and the UPA commander in Poland, Miroslav Onyshkevych, was arrested in March 1948 in Lower Silesia and subsequently sentenced to death. According to the findings of the Polish Institute of National Memory over the duration of Operation Vistula about 1,000 Ukrainians were shot dead.[38]

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[33] CAW, f. Główny Zarząd Polityczno-Wychowawczy WP, sygn. IV.112.290.

[34] Op. cit.

[35] AAN, f. Ministerstwo Administracji Publicznej (MAP), sygn. 781.

[36] KERSTEN, Krystyna. *Narodziny systemu władzy. Polska 1943–1948*. Poznań 1990, p. 341.

[37] MOTYKA, G. *Ukraińska partyzantka...*, p. 587.

[38] DZIUROK, Adam, GAŁĘZOWSKI, Marek, KAMIŃSKI, Łukasz, MUSIAŁ, Filip. *Od niepodległości do niepodległości. Historia Polski 1918-1989*. Warszawa, 2010, p. 238.

Of course, the government could not reveal the main purpose of Operation Vistula, as it contradicted communist slogans about democracy, friendship between nations, and the brotherhood of the working people. Therefore, it was justified in terms of the extermination of the UPA, thus transferring responsibility for its implementation to the Ukrainians themselves. It was a planned way to hide the crime committed.[39] In this way, communist propaganda was to work throughout the entire existence of the Polish People's Republic (1944/52–1989).

The generation and subsequent maintenance of the negative image of the Ukrainian in Poland, which was associated with the epithets "Ukrainian nationalist", "Banderite", and "murderer", was of variable intensity and individual waves of more intense occurrence are observable. Concerning the shifts in this image, there is also an apparent dependence on the internal political situations in Poland. In particular, the anti-Ukrainian campaign intensified during the political crisis of the regime, when the Ukrainian minority demanded their rights.

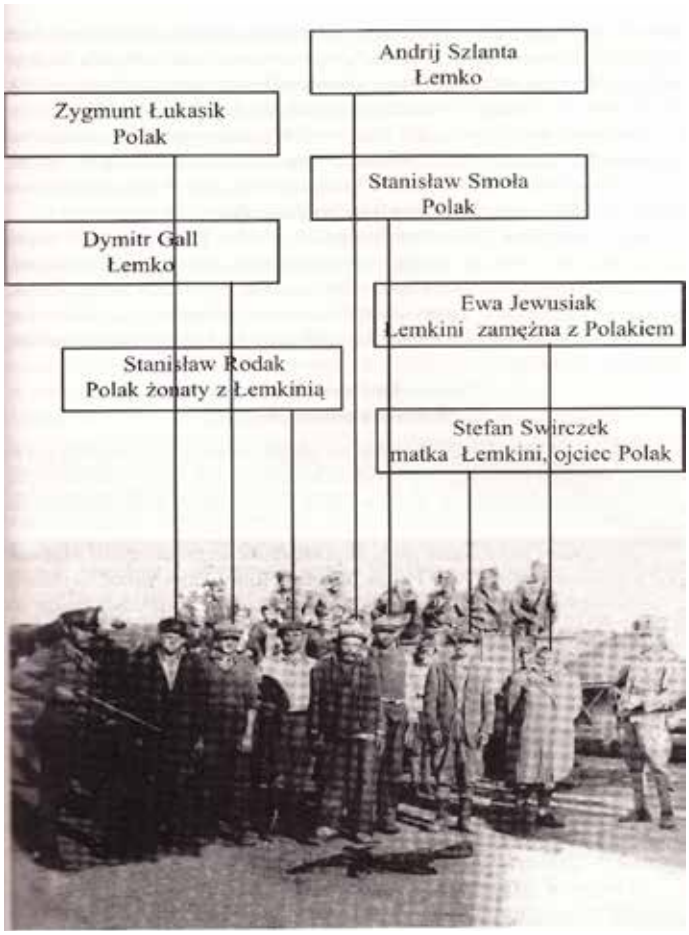
During Operation Vistula, the activity in this area was concentrated in the publishing of newspaper articles, the taking of photographs, and the production of short propaganda films, as well as the calling of meetings in workplaces, etc. All these activities were supposed to stimulate the feeling of the threat of the Ukrainian underground and the cooperating Ukrainian population. The message was unambiguous and it pointed to the need for the deportation of Ukrainians (although they were Polish citizens). Another wave took place after 1956, when, after the establishment of the Ukrainian Socio-Cultural Association (Polish: Ukraińskie Towarzystwo Społeczno-Kulturalne) and under the influence of the political "thaw" in Poland caused by the events of the "Polish October", the Ukrainian community demanded the condemnation of Operation Vistula and their return to their original places of settlement. Anti-Ukrainian machinations were re-launched, repeating the tendentious image of Ukrainians from the post-war years. This time, pro-regime works of literature were involved along with articles in the press. Fiction with a certain "purpose" emerged, which in a sensational and emotional way (and at the same time falsely) depicted the fight against the UPA. Among the most popular novels falsifying the image of the Polish-Ukrainian conflict in south-eastern Poland were *The Glow in Bieszczady* (Polish: *Łuny w Bieszczadach*) by Jan Gerhard,[40] which became a bestseller in 1960, and *Traces of Lynxes Claws*, written by Wanda Żółkiewska.[41] Both novels were also compulsory school reading (the first in secondary schools and the second in primary schools) and they were to form a negative image of Ukrainians among new generations of Poles. Another anti-Ukrainian wave came after the political crisis in Poland in the years 1968–1970. It was marked by a continuation of activities from the previous period, but supplemented with a new element. In 1973 the book written by General Apolinary Oliwa *When Blessings to the Knives were Given* (Polish: *Gdy poświęcano nożе*) appeared.[42] The book was written in the form of memories and the killing of the Poles by the UPA units in Volhynia was described on its pages several times. Although the events described did not concern the Ukrainians deported from Poland, they gave birth to a myth of a ritual blessing of the knives in Ukrainian churches before the act of killing. By this myth the memory of the bloody Polish-Ukrainian conflict in Volhynia was strengthened, as well as the negative image of the "Ukrainian-killer". Finally, the last wave came in the 1980s—another period of crisis for the regime, associated with the emergence of the Solidarity (Solidarność) movement.

[39] The Polish Institute of National Memory recognizes the *Operation Vistula* as a crime of communism. On the other hand, M. Olchawa proves that it was an ethnic cleansing. OLCHAWA, M. *Akcja „Wisła"*..., pp. 43–49.

[40] GERHARD, Jan. *Łuny w Bieszczadach*. Warszawa, 1959.

[41] ŻÓŁKIEWSKA, Wanda. *Ślady rysich pazurów*. Warszawa.1965.

[42] OLIWA, Apolinary. *Gdy poświęcano nożе*. Opole. 1973.



Pict. 3: *Propaganda photograph ostensibly depicting members of the UPA in capture. In fact, the people in the picture were the inhabitants of the village of Łosie, close to Gorlice, of Ukrainian and Polish nationality, who were later identified.*
Source: WOŁOSIUK, Leszek: Historia jednej fotografii ze wsi Łosie. In: *Problemy Ukraińców w Polsce po wysiedleńczej akcji „Wisła" 1947 roku*. Pod red. W. Mokrego. Kraków 1997.

Typical of this period were the books by Edward Prus and Artur Bata, which appeared in the late 1980s, i.e., in the last stage of socialist Poland. A total of 58 scholarly and non-fiction works, 50 memoirs, 10 volumes of the popular series *Yellow Tiger*,[43] and more than 60 novels were published in Poland on the post-war Polish-Ukrainian conflict.

In literature, the "inconvenient" facts were omitted and those "necessary and exposed", their significance often exaggerated, were particularly emphasised. Authors also falsified the facts and wove unreal events, adapting them to the desired communist rhetoric (see photo nr. 4–5). Example can be picked out from Gerhard's aforementioned book: for instance, there is the scene of a "dance at the minefield", which is a total fake, or the scene of the decapitation of captured Polish soldiers using a carpenter's axe.[44] Michał Fijałka, in his work on the 27th Volhynia Infantry Division of Armija Krajowa (1986), wrote: "The most tragic was the murder 'ceremony' itself, usually associated with the blessing of a priest and the blessing of murder tools—axes, scythes, rakes, crowbars, and weapons."[45] At the same time, the facts regarding killings of the Ukrainian population committed by Polish soldiers, militia, and security officials or members of the Polish underground movement were concealed and ignored. This issue has been similarly presented in a number of articles, non-fiction books, and scholarly papers, as well as in radio broadcasts and television programmes.

[43] The Library of Yellow Tiger (Polish: *Biblioteka* Żółtego Tygrysa)—a book edition of historical character, published by the Ministry of National Defense of Poland in the years 1957–1989. It consisted of small-format volumes focused on episodes of World War II. A total of 420 books were published in this series.

[44] For more details on this topic, see: MOTYKA, Grzegorz. *W kręgu „Łun w Bieszczadach". Szkice z najnowszej historii polskich Bieszczad*. Warszawa, 2009; TRUCHAN, Myroslaw. *Nehatywnyj stereotyp ukrajincia w polśkij pislawojennij literaturi*. Mjunchen-Lwiw. 1992.

[45] FIJAŁKA, Michał. *27. Wołyńska Dywizja Piechoty AK*. Warszawa, 1986, p. 46.

Rzeszowszczyzna, 1947. Pacyfikacja wsi podczas Akcji „Wisła".
Fot. Jan Gerhard, archiwum Jerzego Tomaszewskiego

Pict. 4: *Ukrainian village burnt by the Polish army*; original photo published in the magazine *Karta* (nr. 49/2006, p. 39).

Wieś podpalona przez banderowców

Pict. 5: *Photograph of the retouched original with statement that the village was burnt by the Banderites*. Source: SZCZEŚNIAK, A.B., SZOTA, W. Z.: *Droga do nikąd*..., p. 362.

Assessing the content, only a few works were scientific, but they were intended for a small circle of experts. Examples of this are Ryszard Torzecki's work *The Ukrainian Question in Politics of the Third Reich 1933–1945* (1972),[46] or Andrzej Kwilecki's book *Lemkos: The Issue of Migration and Assimilation* (1974),[47] which for years previously could not have appeared due to the State Security objections. The monograph by Antoni B. Szcześniak and Wiesław Z. Szota *The Road to Nowhere: Activities of the Organisation of Ukrainian Nationalists and its Destruction in Poland*, published in 1973,[48] could also be included in this group of books. The last one was very quickly withdrawn from bookshops and libraries and a portion of the impression has been destroyed, as some of the facts were in contradiction with the then-spread propaganda image of the UPA.

At least three feature films have been made on the subject. The most popular of these was *The Sergeant Kaleń* (Polish: *Ogniomistrz Kaleń*), a film adaptation of Gerhard's novel *Łuny w Bieszczadach*. The film did not differ significantly from the literary text and continued to spread negative anti-Ukrainian stereotypes. It was made in 1961 and was directed by Ewa and Czesław Patelski (a pro-regime director, who in 1959 had introduced himself with the film *Base of the Dead People* on the topic of fighting with the UPA). Other films followed: in 1963, *The Broken Bridge* (director Jerzy Passendorfer) and in 1968 *Wolf Echoes* (director Alexander Ścibor-Rylski). These films were screened—several times and deliberately—at the time of Ukrainian (i.e. Orthodox and Greek-Catholic) Christmas.[49]

Such a negative image was also created by many memorial sites, including memorials and plaques dedicated to victims of fighting with the UPA, including the most important memorial to General K. Świerczewski, in Jablonka. Originally, a smaller obelisk was installed in 1957, which was replaced in 1962 by a massive monument—a granite obelisk crowned with a stylised Piast eagle, designed by Franciszek Strynkiewicz. Until 1989, the memorial was the destination of the marches of young "pioneers" (members of the children's organisation) on the "last road of General Walter Świerczewski". (The memorial was disassembled in 2019 and its fragments moved to the exposition of Soviet propaganda memorials at the Polish Institute of National Memory.) In addition to the memorial, a museum dedicated to the "heroic death of the general" and to the fights with the Banderites was established in Jabłonka. The museum (which ceased to exist in 1990) was a mandatory stop for all school trips to the Bieszczady Mountains. Exhibitions in the rooms of military memorabilia of the units that had fought against the UPA also played an important role in this respect. Their purpose was to "appropriately" affect the mind of the soldiers of the Polish People's Army.

On the other hand, traces of the centuries-old existence of Ukrainian culture in the region of south-eastern Poland (from where many Ukrainians were deported) were removed. An example of this was the fate of Greek-Catholic and Orthodox churches ("cerkvi"). Before World War II, 552 churches were in the jurisdiction of the Roman Catholic Diocese of Przemyśl, of which only 269 shrines "had survived". Most of them—which "did not survive"—were deliberately

[46] TORZECKI, Ryszard. *Kwestia ukraińska w polityce III Rzeszy 1933–1945*. Warszawa, 1972.
[47] KWILECKI, Andrzej. Łemkowie. Zagadnienie migracji i asymilacji. Warszawa, 1974.
[48] SZCZEŚNIAK, Anton B., SZOTA, Wiesław Z. *Droga do nikąd. Działalność Organizacji Ukraińskich Nacjonalistów i jej likwidacja w Polsce*. Warszawa, 1973.
[49] OLSZAŃSKI, Andrzej Tadeusz: Na drodze do pojednania. In: *Res Publica*, 1988, nr 11, p. 64.

destroyed.[50] In the socialist Poland there was no state museum[51] which would present Ukrainian culture, nor any exhibition of it. In the existing open-air *Museum of Folk Architecture* in Sanok, with its vast collection of wooden churches, residential and utility buildings, ceramics, and folk instruments, the objects were not presented as monuments of the Ukrainian culture, but only as artifacts of regional groups of Lemkos and Boykos. The fact that these are Ukrainian ethnic groups was cautiously concealed. Similarly, the expositions of icons were presented only as "Orthodox" or "Greek-Catholic", and as Carpathian, i.e. without affiliation to nationality.

The propaganda images of the Ukrainian nationalist who was portrayed as a "bandit and murderer", and of the entire Ukrainian underground movement as fascist and collaborating with the Germans, maintained and deepened a sense of antipathy and even hostility towards the Ukrainians in Polish society.[52] The whole community of the Ukrainian minority in Poland was accused of cooperating with the UPA (i.e., the principle of collective guilt was applied). Ukrainians thus became viewed as staunch nationalists and enemies of Poland and the Poles. The guardian of this attitude became not only the regular censors, but also the communist secret services, who tried to eliminate opinions that were not in accordance with official statements. Certainly, it would be very simplistic to blame the post-war propaganda for the mutual aversion of Poles and Ukrainians. The hostility was born in the previous decades and its origin probably dates back to the period of the Polish-Lithuanian Union (so-called First Rzeczpospolita). Subsequently, it sharpened in the interwar period and culminated during the Second World War.[53] The communists did not cause this aversion, but they supported and sustained it by propaganda. Of course, this in no way justifies those propaganda efforts; formally, the communists had declared repeatedly that the power they obtained would be used for the sake of the state and for the benefit of the nation, and that it must strive for the harmonious coexistence of citizens and not divide them.[54]

* * * * *

As for the view of the displacement of the Ukrainian population from Poland and the image of the "Ukrainian Banderite" in the period of real-socialist Czechoslovakia, in principle it did not differ from the Polish, but there are some differences. However, in the case of the Ukrainian minority which inhabited the north-eastern part of Slovakia, the Czechoslovak post-war government (like the Polish one, seeking to homogenise the state without national minorities) did not choose such drastic ways to reduce the minority, although the inspiration of the Lublin Protocols is proven. The government used them as a template in concluding two agreements on the mutual resettlement of the population from the USSR (1945–1946), but the

[50] BRYKOWSKI, Ryszard. W sprawie architektury cerkiewnej województwa rzeszowskiego po 33 latach. In: *Losy cerkwi w Polsce po 1944 roku*. Rzeszów, 1997, pp. 151, 155.

[51] NIEROBA, Elżbieta. National Museums and Museums of Modern Art in Poland: Competition for Domination in the Field of Museums. In: *Muzeológia a kultúrne dedičstvo*, vol. 6, 2018, is. 2, pp. 45–58.

[52] For more details, see: MOTYKA, Gregorz. *W kręgu „Łun w Bieszczadach". Szkice z najnowszej historii polskich Bieszczad.* Warszawa, 2009; MĘDRZECKI, Włodzimierz. Obraz Ukraińca w polskim dialogu publicznym po drugiej wojnie światowej. In: *Wołyń i Chołmszczyzna 1939–1947 rr. Polśko-ukrajinśke protystojannja ta joho widłunnja. Doslodżennja, dokumenty, spohady*. Lwiw, 2003, pp. 353–367.

[53] SZELĄŻYK-KOMENDA, Ołena. Temat Ukrainy w literaturze polskiej. Paradoks mitu Ukrainy. In: *Biuletyn Ukrainoznawczy, nr 12*. Przemyśl, 2006, pp. 111–123; ŁOZOWSKA, Katarzyna Renata: Wokół stereotypu Ukraińca. In: *Polska-Ukraina: historia, polityka, kultura*. Pod red. S. Zabrowarnego. Szczecin-Warszawa, 2003, pp. 11–26.

[54] For details see: DROZD, Roman. *Ukraińcy wobec swojej przeszłości (1947–2005)*. Warszawa, 2013.

principle of voluntary resettlement was indeed fulfilled by the Czechoslovak side.[55] Even in the frame of the activities of the UPA units in Czechoslovakia in the post-war years 1945–1947,[56] the Ukrainian minority as such was not blamed as supporting or cooperating with them (and indeed, actually did not do so). As for the support of the Banderites, Czechoslovak communists blamed, rather, domestic political opponents—non-communist parties, especially the Slovak Democratic Party, as well as the Greek-Catholic Church. The aim in this was to discredit them during the struggle to establish the communist regime in Czechoslovakia in 1947–1948.[57]

It was this perspective that was transferred into contemporary propaganda, to scholarly and artistic writings in Czechoslovakia. For instance, a comment piece entitled "Benderovci" by an anonymous author, which was published at the beginning of 1947 in the newspaper *Východoslovenská pravda*, states thus: "

Unknown men with machine guns in their hands. What kind of people are they? In their stomachs, gypsies forge nails [i.e. they are hungry], they do not have food ration tickets, but they have "long fingers" [i.e. they are thieves]... What else do they have? Great prospects for the future: the rope, the hook, and the beams of the gallows, or the "heroic" death behind the hump with the tongue out. In Poland, their soles are burnt on the hot soil..."[58]

An almost "prophetic" impression was given by Michal Mareš, published in August 1947—at the time of the crossing of the territory of Czechoslovakia of two UPA sotnias (*Hromenka* and *Burlaki*) with the aim to enter the American Zone in Germany: "

They are herds of military, political, and criminal offenders ... They go from east to west, and individuals or groups can emerge anywhere. Once they have crossed our western frontiers, they are safe; they will certainly not return. But for now the Banderites are among us. And we shall hear a lot about them. Real and fantastic".[59]

And looking back, in view of the historical evidence, it is necessary to agree with the last two sentences of the author.

It should be noted that even in Czechoslovakia the issue of the UPA has been the subject of certain conjunctural waves of interest, or has at particular times served certain political needs or usefulness[60] (but always according to the established and politically accepted template, as was the case in Poland). Czechoslovak historiography "successfully" avoided it, or studied it very sporadically and marginally. As a result, the scope for political journalism and similarly focused non-fiction literature has expanded. They basically substituted for professional historical literature until the end of the 1980s. Due to the absence of serious and impartial academic research throughout this period, the individual findings were only repeated periodically. As

[55] In 1947, 12,000 Ukrainians resettled voluntarily in the territory of Soviet Ukraine—about 13% of the then minority. See: ŠMIGEĽ, Michal, KRUŠKO, Štefan. *Opcia a presídlenie Rusínov do ZSSR (1945–1947)*. Bratislava, 2011.

[56] See: ŠMIGEL, Michal. *Banderovci na Slovensku (1945–1947)*. Banska Bystrica, 2007.

[57] ŠMIGEĽ, Michal, SYRNÝ, Marek. „Rázne a prísne proti banderovcom..." Bezpečnostné a politicko-spoločenské aspekty prienikov oddielov Ukrajinskej povstaleckej armády na územie Československa v rokoch 1945–1947. In: *Acta historica Neosoliensia*, 2019, vol. 22, is. 2, pp. 37–45; RĚPA, Tomáš. Ukrajinští nacionalisté a komunistická propaganda. Zneužití tématu v Československu po roce 1945. In: *Paměť a dějiny*, 2014, vol. VIII, is. 2, pp. 47–57.

[58] Benderovci. In: *Východoslovenská pravda*, 4. 01. 1947.

[59] MAREŠ, Michal. Banderovci se blíží... In: *Dnešek*, 7. 08. 1947, p. 295.

[60] As A. Hruboň stated, the Slovak "legal definition does not reflect the scientific dialogue [...] and what is worse, orders the historians as well as the broader public (sometimes under the threat of sanctions) how to define the historical terms, how to interpret historical events and personalities". HRUBOŇ, Anton. K identifikácii protikomunistického odboja na Slovensku (o interpretačnom labyrinte jeho historickej, právnej a spoločenskej roviny). In: *Historický časopis*, 2015, vol. 63, is. 3, p. 504.

a result, propagandistic fiction, distorted facts, and inexistent events have formed a sort of unchallenged myth and stereotype of the "Antibanderite Legend".

The first book publication on the matter, which, however, did not deviate from journalism by its nature and which resembles a pamphlet, was the brochure entitled "Real Face of Banderites: Operation B Against the Civil Network", written by Václav Slavík and published in 1949 (Slovak translation published in 1950).[61] It was an extended version of a series of articles published by the author in the communist weekly magazine *Tvorba* in 1948. Slavík's text is characterised by the typical vocabulary and stylisation of the then communist press. The author strongly attacked those who had allegedly been a threat to Czechoslovak, Polish, and Soviet statehood. Accused persons were primarily Greek Catholic priests (indeed, the Vatican itself) and the Slovak Democratic Party. The author emphasised the link between the Ukrainian liberation movement and the interests of Nazi Germany. He even attributed the creation of the UPA to the strategic plans of the "German Secret Staff". Yet Slavík did not knowingly distinguish the specification of the individual groups of the Ukrainian political spectrum—he labelled all of them Banderites, including members of the 14th Division SS "Galizien". The author often contradicts himself while describing the situation in Slovakia. Mentioning the public's opposition and rejection of the "Banderite assassins", he also referred to the "rather substantial support of the civilian population". He also mentioned the different approach of Banderites to Slovaks and Czechs, allegedly because Slovaks are "soaked in the spirit of the People's Party". Undoubtedly, Slavík's brochure represents a propaganda pamphlet. It cannot be evaluated as a significant source of historical knowledge on the UPA issue in post-war Czechoslovakia; rather it could be considered to contribute to our knowledge of the political practice of the Czechoslovak Communist Party. This short text (39 pages) contributed to the formation of the basic contours of the "Antibanderite Legend", which the Czechoslovak communists were able to use propagandistically to discredit their political opponents.

After some period of silence, the UPA issue appeared again in the late 1950s–early 1960s in non-fiction and fiction literature. In 1965, the book *In the Sign of the Trident*, written by František Kaucký and Ladislav Vandůrek, appeared on the Czechoslovak book market.[62] It was evidently created in cooperation with the StB (State Security) and with the approval of the communist party structures (the first of the authors was a collaborator of the Ministry of Interior and the second an employee of it). The book consisted of short, fictionalised reports (with a predominance of dialogues) devoted to individual episodes in the fight against Ukrainian nationalists (in the authors' perception, criminals) and their domestic assistants and sympathisers. In this sense, the most remarkable is the chapter entitled "Bus Perforated by Bullets",[63] which interestingly corresponds to the chapter from the book of memories of the high Polish security officer Stanisław Wałach "There Was a Time in Poland"[64] (in Slovak translation published under the title *Action Against Bandits* at the beginning of the 1970s). In Slovakia, the same reports written by Kaucký and Vandůrek were published in 1965 in *Predvoj*, the weekly of the Central Committee of the KSS for politics, culture, and economy.

Fiction also had a special place in the literature on the UPA. Under the conditions of the totalitarian state, it fulfilled an important ideological function and also shaped the historical awareness of the public in a "desirable" direction. It allowed the various thematic elements

[61] SLAVÍK, Václav. *Pravá tvář banderovců: Akce B proti civilní síti*. Praha, 1949.
[62] KAUCKÝ, František, VANDŮREK, Ladislav. *Ve znamení trojzubce*. Praha, 1965.
[63] KAUCKÝ, F., VANDŮREK, L. *V znamení trojzubca*, pp. 144–149.
[64] WAŁACH, Stanisław. *Był v Polsce czas...* Kraków, 1969.

of propaganda to be presented in an accessible way through compelling stories. The interest of the security forces in the aforementioned fiction was also documented in conclusions, often written by State Security (ŠtB) officers. In the 1950s and 1960s, several translations of Polish novels and short stories were published in Czechoslovakia. First, in 1951, the Slovak translation of a book for young readers entitled *On a Man who Did Not Dodge the Bullets* by Janina Broniewska was published (the Czech translation of the book under the title *Generál Karel Świerczewski, bohatýr polského osvobození* being published in 1953). In 1958, a collection of short stories *Fight* by Wacław Biliński was presented.[65] Of course, the main topic was the struggle against the Banderites in the Polish-Ukrainian borderlands. And in 1962 a novel followed by the aforementioned author J. Gerhard, published under the title *Fires in the Carpathians* (the Polish original title being Łuny w Bieszczadach).[66]

It should be noted, however, that J. Gerhard as an officer of the Polish army had had his own combat experience in south-eastern Poland and in the book he has tried to capture dramatic events in the form of reports. Undoubtedly, the author was an "important actor in the events"—in the rank of colonel he had commanded one of the most brutal units of the Polish army, one which had terrorised and brutally intervened against the civilian Ukrainian population in Poland during its displacement to the Soviet Union (1944–1946). The so-called Polish *Battalion of Death* of Captain Michalski, which became "famous" for its brutality in the pacification of Ukrainian villages, was part of Colonel Gerhard's brigade.

More fiction books on Banderite themes were published at the beginning of the 1970s in the so-called "period of normalisation". The protagonists of party ideology and cultural policy perceived the topic of the UPA as a suitable model for fostering the idea of an ideological struggle with external and internal enemies. In addition, with a sufficient time distance, it was a "substitute" theme during the so-called "age of immobility". Translations from Polish and Russian literature, as well as original novels by Slovak and Czech authors, were published. Undoubtedly, translations from Polish had a prominent place among them.

Another translated novel was Władysław Jarnicki's *The Burnt Land* (in the Polish original, *Spalona ziemia*).[67] It captures not only approximately three years of the civil war in Poland, but the author also paid attention to combat actions against the UPA in Czechoslovakia. This was followed by the publication of the non-fiction genre (reportage series) *In the Shadow of the Trident* by Stanisław Myśliński (in Polish, *Strzały pod Cisną : Bieszczady 1946*; for the Czech edition the text was extended by the author).[68] It presents events from south-eastern Poland in the period 1944–1948 from the perspective of the Polish party and state circles (describing looting, destruction, and acts of terrorism committed by the UPA units, while highlighting the combat heroism of members of the Polish army and security forces). The author did not reflect at all the tragedy of the displaced Ukrainian minority in Poland, the brutality of the Polish government forces, etc. Finally, in 1980, the Slovak translation of the aforementioned novel *Traces of Lynxes Claws*[69] by Wanda Żołkiewska was also published.[70]

[65] BILINSKIJ, Wacław. *Boj*. Praha. 1958.
[66] GERHARD, Jan. *Požáry v Karpatech*. Praha. 1962.
[67] JARNICKI, Władysław. *Spálená země*. Praha. 1972.
[68] MYŚLIŃSKI, Stanisław. *Ve stínu trojzubce*. Praha, 1973.
[69] ŻOŁKIEWSKA, Wanda. *Stopy rysích pazúrov*. Košice 1980.
[70] See: VESELÝ, Luboš. „Proti fašistickým bandám UPA". Ukrajinci v propagandě lidového Polska. *Soudobé dějiny*, 2010, vol. 17, is. 4, pp. 679–688.

In 1972, the original novel by the Slovak author Ladislav Beňo *Dangerous Zone* appeared,[71] with a focus on the period 1945–1948 and the environment of the Slovak mountains as a scene of combat clashes with the Banderites. Characterising the basic features of the UPA members, the author stated that they were compromised people (former SS officers) "who were afraid to put down their weapons and return home because they were guilty and had betrayed their own nation during the war, had committed various crimes, and now had become allies of fascist organisations and opponents of the popular democratic regime".[72] Beňo quite effectively and impressively combined real facts with fiction and self-interpretation.[73]

The topic of the UPA also found its place in original Czech fiction. In 1978, Jaroslav Netolička's novel *Time of Foggy Nights* was published.[74] As was the case with J. Gerhard and L. Beňo, J. Netolička too was a direct participant in the campaign against the UPA (in the autumn of 1947), which was reflected to some extent in certain parts of his book. It has a thoughtful ideological construction. Although the cover of the book bears a statement about a basis in true events, the story itself is an obvious fiction. The image of the "Ukrainian Banderite" is depicted by the author in extremely negative terms: especially, an inability to feel any mutual solidarity, not to mention a coldness in their relationships with other people. According to the author's literary license, the behaviour of and motivation for the actions of the Banderites and their "home helpers" lay only in greed and pathologically murderous tendencies.

The most noteworthy book published on the topic of the UPA before the fall of the communist regime in Czechoslovakia was the non-fiction publication *The Banderites* (*Banderovci*) by Bohuš Chňoupek (a journalist, politician, and diplomat in the time of Husák's normalisation period).[75] The author has obviously studied a large amount of archival material, memoirs, and scholarly literature of Czech, Slovak, Polish, and Ukrainian origin. Working on the book, Chňoupek was undeniably approaching the topic with a pre-formed belief in the "obviously monstrous form of Ukrainian bourgeois nationalism". Despite the "advancedness of the time" of the 1980s, he was unable to approach this issue objectively, he did not even try to empathise with the Ukrainians, and his condemnation of them is very clear. Therefore, he also used traditional terminology with expressive words for anything related to the UPA ("bands", "bandits", "Huns", "invaders of Genghis Khan", "Banderite lairs", etc.), as well as some well-known ideas formulated and taken from Slavík. Chňoupek did not avoid inaccuracies, errors, and contradictions in his extensive novel; he also used unverified and unverifiable pieces of information. On the other hand, the author introduced some themes not previously discussed in the literature (e.g. attempts to establish an independent Ukrainian state, Ukrainian emigration in interwar Czechoslovakia, the high representation of intelligence in the OUN and UPA, the tragic resettlement of Ukrainians in Poland, the depopulation of the Bieszczady Mountains, etc.). The book by Chňoupek has met with great interest and is published periodically in the Czech Republic to this day.

In addition to original fiction (including several popular texts within literary subsystems), television and film productions have also been intended for the public. Their importance in the creation of the "Antibanderite Legend" must be particularly emphasised, especially in

[71] BEŇA, Ladislav. *Nebezpečná zóna*. Bratislava, 1972.

[72] Op. cit., p. 90-91.

[73] See: KMEŤ, Miroslav. Vecná a umelecká literatúra o problematike Ukrajinskej povstaleckej armády v Československu pred rokom 1990. In: *Acta historica Neosoliensia*, 2005, vol. 8, pp. 168–169.

[74] NETOLIČKA, Jaroslav. *Čas mlhavých nocí*. Ostrava, 1978.

[75] CHŇOUPEK, Bohuš. *Banderovci*. Bratislava, 1989.

consideration of the high opinion-forming function of television media in the process of reaching out to the general public, especially in the 1950s and 1970s. In Czechoslovakia the Banderites issue was presented in the film *Operation B* (*Akce B*, 1951), directed by Josef Mach, and based on the text of Eduard Fiker. It was very successful among viewers in the 1950s and was screened in other countries of the Soviet bloc. In 1952, Mach was awarded the state prize of II degree. The critic A. Novak, aka Jan Žalman, slightly criticised the film: "This film was aiming for a great goal. However, it got stuck halfway…"[76] Other members of the period's press, however, wrote generally positively about the film. The film itself depicted the events of 1947 associated with the crossing of the UPA unit *Burlaka* through the territory of Slovakia and the struggles of the Czechoslovak army and security forces with the "band". However, in later years the film was withdrawn from the film screen, apparently because of excessive ideologisation, untrustworthy political manipulation, and "artistically creative" distortions of actual events. The historical fidelity was mainly distorted in the hyperbolisation of the brutality of the Banderites in scenes, for example, of the burning of villages in Poland, or of wild assaults of Slovak villages (with pictures of bandits shooting Slovak peasants, brave communists, old women, costumed girls, etc.). The film shows also the supporters of the UPA among the priests of the Greek-Catholic Church and the leaders of the Democratic Party, who are linked to the Western espionage network. The film is the cinematographic equivalent of Slavík's pamphlet.

One of the episodes of the popular TV series *Thirty Cases of Major Zeman* (*Třicet případů majora Zemana*), entitled "Ruby Cross" ("Rubínový kříž", 1976), focused more or less on revealing the civilian network of Ukrainian nationalists and its connection with Western intelligence services.[77] The TV series is regularly screened in the Czech Republic and Slovakia till today. *Shadows of a Hot Summer* (*Stíny horkého léta*, 1977) by František Vláčil was another very successful action film, repeatedly screened on Czechoslovak television, usually on the Day of the National Security Corps (17 April). These films were typical products of the era; they create the image of "Banderite fascist bloodthirsty groups" which was suggested to Czechoslovak viewers.[78]

The monograph of Jan Fiala *Report on Operation B* (*Zpráva o Akci B*) has become the imaginary peak of historical research results in the former Czechoslovakia (at the same time completing the research of the history of the UPA in the author's professional career).[79] Fiala focused on the course of Czechoslovak actions against the penetrating groups of the UPA and their crossing through the territory of Czechoslovakia in the years 1945–1947. The book is based on the outcomes from extensive archival research on Czech and Slovak archival materials. In the chapters describing the history of the Ukrainian liberation movement, or evaluating and assessing the activities of the UPA, the author has remained in line with interpretations common for the period prior to year 1989. He unambiguously described UPA members as fascists, or as the "remains of fascism", even though he refused the traditional labelling of the UPA units as "bands" or "gangs" because, as the author put it, they were essentially a "militarily organised and guided force".

In the introduction to his work, he criticises the non-fiction and fiction literature published in Czechoslovakia. Despite the proclaimed effort to clarify the previously distorted interpretations

[76] ŽALMAN, Jan. Akce B. In: *Kino*, 1952, č. 7, pp. 164–165, 167.

[77] See: BLAŽEK, Petr, CAJTHAML, Petr, RŮŽIČKA, Daniel. Kolorovaný obraz komunistické minulosti. Vznik, natáčení a uvedení Třiceti případů majora Zemana. In: *Film a dějiny*. Praha 2005, p. 293.

[78] See: ŘEPA, Tomáš. *Banderovci. Politické souvislosti, následky zneužití tématu komunistickou propagandou, návaznost na hybridní konflikt v současnosti*. Praha 2019, pp. 297–303.

[79] FIALA, Jan. *Zpráva o akci B*. Praha 1994.

of events, the author has not always succeeded. Although he was aware of the repression by the Polish post-war government of the Ukrainian population during a forced resettlement (the author speaks of the joint contribution of the Polish authorities and the anti-communist opposition to violence against Ukrainians in Poland),[80] he did not sufficiently accept the government's share in the incitement of the UPA's activities in Southeast Poland.

Fiction (both original and translated) on the subject of the UPA was of a different quality in Czechoslovakia. It was perceived as a branch of popular literature, as it was allowed to use mainly elements of thrill, drama, and adventure. The blending of artistic narrative and precise facts was in most cases unbalanced, "artificial" from an aesthetic point of view, and characterised by a distinctive black and white evaluation. In the case of both factual and artistic literature it is clear that they were—in regard to the political sensitivity of the topic—under the patronage of the security forces of the regime and thus complied with the intentions of propaganda. The elaboration of this politically usable topic was necessarily subject to the careful scrutiny of the state's political and power structures.

It should therefore be noted that the publisher of this literature in Czechoslovakia was mainly the Ministry of the Interior and Defence, specifically the National Security Corps (ZNB). In particular, the National Security Corps "adopted" and "appropriated" the topic (at the expense of the army—as J. Fiala pointed out in his articles). The campaign against the Banderites (1945–1947) became a deliberate building of the pillars of the Corps' fighting traditions in a struggle with the outside class enemy and a domestic "reaction". This was reflected in a number of publications dealing with the establishment and development of the ZNB (from the 1960s to 1970s), as well as in the exhibitions of the Border Guard Museum in Prague (since 1973 the Museum of the National Security Corps and Units of the Ministry of the Interior), or in numerous exhibition rooms of martial traditions and fame. In addition to the ZNB, the Association of Slovak Partisans was often involved in the commemorating of the "anniversary of the fighting with the Banderites" in Slovakia.

On the other hand, in the "civil" museum sphere of Slovakia, or of Czechoslovakia, the topic of Banderites was not covered. In particular, the issue of "fascist Banderites–Ukrainian nationalists" was considered inappropriate and counterproductive in the framework of the state policy of the Ukrainianisation of the Ruthenian minority in Slovakia (from the beginning of the 1950s; see below). Soldiers and civilians who had died in the time of the fighting with the Banderites also found themselves on the periphery of interest. Only the names of six aspiring soldiers (who died in a combat clash with UPA warriors in August 1947 on the hill of Ľupčianska Magura, south of Partizánska Ľupča) were carved on the side of the Slovak National Uprising memorials in Ružomberok and Partizánska Ľupča. Also, the graves of two communists, killed by alleged Polish Banderites at the end of 1945 in Nová Sedlica (district of Snina), were declared a National Cultural Monument. But the Jews from the neighbouring villages of Ulič and Kolbasov, who were brutally murdered (four in the village of Ulič and eleven in the village of Kolbasov), were not deemed to deserve such special respect. A memorial plaque to the Jewish victims of the massacre in Kolbasov was unveiled only in 1996.[81]

[80] Op. cit., p. 39.

[81] ŠMIGEĽ, Michal. Neobjasnené vraždy Židov v Sninskom okrese na konci roku 1945. Tragédia v Kolbasove a jej pozadie. In: MARCINEKOVÁ, J. et al. *Fragmenty židovstva (Snina a okolie)*. Snina 2018, pp. 61–85.

Conclusion

The images of the UPA as "Ukrainian Banderite" as created in the communist propaganda of Poland and Czechoslovakia (and even earlier in the Soviet Union) were almost identical, and their propaganda mechanisms worked on the same principle. From the Soviet model they took over the linking of the UPA with fascism, and later with Western espionage. It was in this manner that both the Czechoslovak and Polish communist propaganda accused their political opponents of supporting "Ukrainian fascism". Propaganda makers in both countries employed the proven tactic of evoking a threat and uncovering a conspiracy against the "legitimate" government of the working people. In connection to conspiracy they were looking for internal and external enemies. At the same time, they glorified and heroicised the deployment of the state force structures, mainly with the aim of building up their combat traditions, which were born in the struggle with the external class enemy and domestic "reaction". (In Poland the struggle was carried out by an Army; in Czechoslovakia it was, rather, the National Security Corps.)

While Czechoslovak propaganda extended the discreditation to the Greek-Catholic Church with the aim of its destruction, the Polish effort used it to solve the "Ukrainian nationality problem", which finally took the form of forced resettlement actions. It applied the principle of collective guilt to the Ukrainian minority in Poland, which made it possible, through Operation Vistula, to disperse the remains of the population in the area of western and north-western Poland for assimilation. Typically, Polish victims of the Banderites were praised while Ukrainian victims were not mentioned. The propaganda of the following years continued to maintain the distorted image of the Ukrainian, or of Ukrainian-Polish hostility, through proven tools (including the press, non-fiction and fiction literature, and cinematography). These measures ultimately strengthened the process of "national self-censorship" and accelerated an assimilation of the minority. In relation to the Ukrainian minority in Czechoslovakia, communist propaganda had no reason to create social tensions, as Ukrainian-Slovak relations in Eastern Slovakia were trouble-free and the significant assimilation of Ukrainians was under the influence of other factors. Therefore, the Banderite issue was presented in some way as exported from Poland. (The origin of the Ukrainian resistance in the USSR was not mentioned on principle: it was not deemed appropriate). As in Poland, in Czechoslovakia too the issue of the UPA was subject to certain conjunctural waves of interest, dependent upon the current political demands or usefulness, but always according to the established and politically accepted template. Black-and-white interpretations, propaganda fictions and twisted facts, and the concealment of some and the disproportionate highlighting of other facts, which also took place in the literary and film works of the real-socialist period, merely jeopardised the pursuit of historical objectivity and created a complicated stereotype in the historical memory. Paraphrasing the Polish historian G. Motyka, we can sum up that we often do not even realise to what extent today's views on the Polish-Ukrainian conflict and on the UPA are the result of long-term communist propaganda. It has penetrated deeply into the collective consciousness, but it is also reflected in the opinions of historians.[82]

In contrast to their similarly working mechanisms of propaganda, however, the official state cultural policies of Poland and Czechoslovakia were very different in regard to the Ukrainian minority. Speaking of communist Poland, the creating of a picture of the "Ukrainian Banderite"

[82] MOTYKA, Grzegorz. O niektorych trudnościach badania konfliktu polsko-ukraińskiego w latach 1943–1947. In: *Kultura i Społeczeństwo*, 1993. vol. 37, is. 4, p. 166.

in the country's cultural policy has not taken much space. This was done by propaganda, which used fiction, film, press, and radio. No state museum was set up, except one in Jabłonka (dedicated to K. Świerczewski), and no exhibitions related to the fight against the UPA were exhibited. There were no theatrical performances on this topic. To put it simply, the communist regime used the mechanisms of the so-called mass culture to disrupt the image of the Ukrainians. It would reach as many people as possible in its goals. The partial ministries of culture in socialist Poland did not deal with the Ukrainian question. From 1956, the functioning of the Ukrainian Socio-Cultural Association was not subordinated to the Ministry of Culture but to the Ministry of the Interior (!). The activity of this Ukrainian association was limited to "outside national and socialist inside" by the government. Finally, activities related to the "resurrection" of the Ukrainian culture in the region of south-eastern Poland, initiated by Teodor Gocz (and other Ukrainian activists) in the 1950s and 1960s, and the establishment of a private open-air Museum of the Lemko culture in Zyndranowa, irritated Polish communist authorities. This museum's very existence was contrary to official propaganda. On the one hand, it reminded that the area had previously been inhabited by Lemkos, and that could raise questions among the curious: what had happened to them, and why were they displaced? On the other hand, it pointed out that the "Polish" Ukrainians (including Lemkos) had fought in the Red Army for the liberation of Poland, and that many of them had died in a battle of the Dukla Pass. That is why in 1976 government authorities ordered the demolishment of a memorial built by T. Gocz, and the persecution of its creator.

At that time, Ukrainian culture literally flourished under the communist regime in Czechoslovakia. After the destruction of the Greek-Catholic Church (1950), the demise of the russophile Ukrainian National Council of Priashevshchina (1952), and, paradoxically, during the trials of the "Ukrainian bourgeois nationalists" in Slovakia, government policy focused on the process of the so-called "Ukrainianisation" of the Ruthenians of north-eastern Slovakia. The purposeful Ukrainianisation, enforced and monitored by state and political authorities, began in the early 1950s with the construction of Ukrainian schools. It also included a cultural policy managed through the Cultural Union of Ukrainian Workers, which was established in 1951 in Prešov with the aim of spreading Ukrainian culture. Prešov also housed the Ukrainian National Theatre (from 1946), and there was also Ukrainian radio broadcasting. The Association of Ukrainian Writers of Slovakia was established in the town and many Ukrainian newspapers and magazines were published there (*Nove žyťťa*, *Družno vpered*, *Dukľa*, *Veselka*). In 1956 the Museum of Ukrainian Culture (in Czechoslovakia at that time the only one focusing on a particular nationality) was established in Prešov, and moved to Svidník in 1964. Finally the annual Cultural Festival of Ukrainian Workers began to take place in the town.[83] In addition to the occurrence of such rich cultural activities of Ukrainians in Slovakia, the issue of the Banderites was practically marginalised; more precisely it was "tactically disappeared in a short time" (it remaining a post-war military affair, or a matter of "Polish" Ukrainians). It was simply not appropriate to commemorate this topic in all segments of the cultural affairs of the "Ukrainian working people". There was no book concerning the UPA written by Ukrainian writers in Slovakia, no exhibitions exhibited, and no plays performed. The image of the "Ukrainian Banderite" had been "swept" into the south-eastern corner of Poland and the theme of the national liberation struggle of the Ukrainians in the USSR had become a "taboo".

[83] See: KONEČNÝ, Stanislav. Kultúrne aspekty vývoja rusínskej a ukrajinskej menšiny na Slovensku v povojnovom decéniu. In: *Človek a spoločnosť*, 2009, vol. 12, is. 1, pp. 43-60.

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CAW – Centralne Archiwum Wojskowe
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Review of the exhibition: "Als Ich Can", 10 July - 6 January 2020, Kunstkammer, Kunsthistorisches Museum, Viena

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Since the end of 2011, the Royal Museum of Fine Arts Antwerp (KMSKA) has been closed to the public due to renovation work. During the period of the museum's closure a series of works from its collection have been loaned to a number of European museums, including the Kunsthistorisches Museum. As a result, a selection of the KMSKA's masterpieces of Early Netherlandish painting are being exhibited with key contemporaneous artworks across Europe.

The exhibition "Als Ich Can", currently on display in Vienna, is focused on Jan van Eyck's painting of the *Madonna at the Fountain*, which forms part of the KMSKA collection. On the painting's original frame the artist added a stylized inscription written in Greek-Byzantine letters that means "as best I can". Undoubtedly, the museum hosting this work and the curators Sabine Pénot, Elke Oberthaler and Katharina Uhlir can state the same, given that the exhibition is the outcome of an international collaboration between the KMSKA and specialists from the Royal Institute for Cultural Heritage (KIK-IRPA), as well as Flanders: State of the Art and sponsors such as UNIQA and Österreich Lotterien. Furthermore, the exhibition is just a foretaste of the range of activities devoted to the figure of Jan van Eyck that will be held in 2020, the outcome of considerable institutional cooperation.

The exhibition is located in two rooms in the museum's Kunstkammer wing, whereby the exhibition space is not on a grand scale. However, given the reduced size of the works on display, all of which are internationally prestigious, the curators have used the space to perfection.

In the first room, an explanatory text offers an account of the life of Jan van Eyck, one that highlights the talent he displayed at the court of Philip the Good, where he served as *valet du chambre*. It also lists the privileges he was granted, as well as his subsequent renown amongst other authors such as Giorgio Vasari. Further information is also provided on the artist, which is illustrated with a reproduction of the sculptural representation of the allegory of painting designed by Carl Kundmann for the metopes of the Kunsthistorisches Museum: a striking nineteenth-century image of Jan van Eyck. At the entrance, visitors can consult the website of the *Closer to van Eyck* project (http://closertovaneyck.kikirpa.be), an initiative created by the KIK-IRPA that permits a close-up study of details of the painter's work and includes reproductions of the *Ghent Altarpiece*. A number of other artworks accompany the introductory and contextual explanation provided by this opening display: a copy of Rogier van der Weyden's *portrait of Philip the Good*, an image frequently used to illustrate histories of the Burgundian state; and the illuminated *Prayer Book-Diptych of Philip the Good*, which is exhibited open at the page representing Philip the Good and Charles the Bold. The latter is a singular and exceptional work from the ducal library, today conserved in the Austrian National Library.

The visitor then enters the second room, which in comparison is filled with artworks. The display of these paintings is divided into three sections that allow visitors to choose their own

route around the room, as each section offers an almost independent historical perspective on Early Netherlandish painting.

In the centre of the room are the three most relevant pieces: van Eyck's *Portrait of the Goldsmith Jan de Leuw* and his *Madonna at the fountain*, accompanied by the embroidered *Paraments of the Order of the Golden Fleece*, which depicts the baptism of Christ and the transfiguration of Christ on Mount Tabor. The first of these works is exhibited horizontally, which enables the inscriptions on the frame to be studied in detail, whereby one can appreciate how this wholly lifelike image, painted with van Eyck's meticulous realism, also addresses its spectators with the words: *Jan de (lion) on St. Ursula's day; saw the light of day 1401; I was now portrayed by Jan; van Eyck it seems that he began, 1436*. The painter likewise "spoke" to his spectators in a similar manner on the frame of the *Madonna at the fountain*, with its the iconography of the Eleusa: as well as *Als Ich Can*, one can read *IOHES DE EYCK ME FECIT + [com]PLEVIT ANO 1439*. The latter work introduces a series of examples of compositions by Early Netherlandish painters that were reproduced in other media, such as the iconographic details depicted in the bas-relief embroidery of the Paraments that Julius von Schlosser attributed to Thierry du Chastel. The works displayed on the right-hand wall of this room offer a contrast to this singular piece of textile craftsmanship, and they include the *Altarpiece of Saint John the Baptist and Saint John the Evangelist* by Hans Memling, which has over the course of its history been linked to the activity of the van Eyck workshop.

The left-hand side of the exhibition is concerned with tracing the subsequent history of works by Early Netherlandish painters as part of early modern art collections. Amongst the works on display is Frans II Francken's painting of a selection of items from the wunderkammer of the Antwerp collector Peter Stevens (c. 1620-1625). Francken's image depicts Gerard David's *Portrait of a Goldsmith* displayed alongside other images and objects. Similarly, an episode from the provenance history of the *Portrait of Cardinal Albergati* is revealed. Van Eyck's painting is displayed alongside a drawing that entered the royal Viennese collection in 1732 which depicts the portrait within a gallery space containing four portraits flanked by two pilasters. Furthermore, the opportunity to examine both sides of the panel on which the *Portrait of Cardinal Albergati* is painted provides insights into the cataloguing methods employed in the collections of which this painting has formed a part. Exhibited alongside these images are two final paintings: one on a panel by the workshop of Rogier van der Weyden, which depicts the *Madonna and Child* with *Saint Catherine* painted on its reverse; the other a diptych of the *Fall and Redemption of Man* painted by Hugo van der Goes circa 1479. Both panels are stylistically very close to paintings by van Eyck.

The themes explored in this exhibition are thought-provoking and clearly presented, and with just a small number of works a range of aspects of current research on Early Netherlandish painting is addressed, including: the meticulous realism and detail of the paintings, the question of artists' copying of compositional models, and the history of these paintings within early modern art collections. Attentive analysis of the works displayed in the exhibition reveals a wealth of details linking together this selection of artworks, and this in turn offers valuable insights into the history of Flemish painting during the first half of the fifteenth century. One such detail that recurs throughout the exhibition is the treatment of the nude and the delicacy with which Flemish artists represented the human body, which can be noted in the reproduction of the wings of the *Ghent Altarpiece* in the first room (Adam and Eve), the *Paraments of the Order of the Golden Fleece* (the Baptism of Christ), the wings of Memling's *Altarpiece of Saint John the*

Baptist and Saint John the Evangelist (Adam and Eve), the grisaille details painted on the frame of the *Madonna with Child* by Rogier van der Weyden, and the *Fall and Redemption of Man* by Hugo van der Goes. Although these five works are attributed to different workshops, a similitude may be noted in the naturalistic definition of the volume of the human body, which also signals the arrival of humanism in Flanders.

The exhibition catalogue, available for purchase at the Kunsthistorisches Museum, contains a prologue by Stefan Weppelmann and a series of studies by Sabine Pénot, Eike Oberhalter and Katja Schmitz von Ledebur. Pénot provides an introduction to the entwined history of the Duchy of Burgundy and Jan van Eyck, while also analysing the enigmatic signatures and inscriptions that the artist included in his work. She goes on to offer an in-depth reconstruction of the history of Flemish panel paintings in early modern art collections. Oberhalter's chapter is devoted to a technical study of the portraits of Cardinal Albergati and Jan de Leeuw. The final chapter, by von Ledebur, addresses the iconography and composition of the *Paraments of the Order of the Golden Fleece*. Regrettably, it overlooks a number of very important bibliographical sources for this set of garments does not discuss the polemic concerning their design, which was very probably inspired by the composition of the deesis in Jan van Eyck's *Ghent Altarpiece*.

The catalogue would have benefited from being prepared with greater attention to detail, given that translations are not provided for all the texts, Oberhalter's not being available in English. Similarly, the catalogue's bibliography, which focuses above all on studies published in German, lacks the most recent and relevant publications on van Eyck. Furthermore, none of the authors mention the issue of the existence, or not, of Hubert van Eyck, a question that should at least be mentioned in a publication of this standing.

With this exhibition the Kunsthistorisches Museum concludes its most recent phase of research on van Eyck's panels, a scholarly endeavour which has provided important results, and in particular a revised and more logical organization of the extensive range of data related to these works by Van Eyck and his contemporaries. The exhibition was planned to run from June until October 2019, but due to its seemingly unexpected success, it has been extended to January 2020, whereby a still greater number of visitors will be able to immerse themselves in the impressive range of works on display. Alongside the recently opened exhibition on Bernini and Caravaggio, the Early Netherlandish painters will be sure to astound visitors to the museum this winter.