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**THE HISTORICAL AND CULTURAL MONUMENT:
A MODERN INTERPRETATION OF THE TERM**

The preservation of historical and cultural monuments as a unit of cultural heritage and as an understanding of the corresponding cultural phenomenon is one of the most pressing global problems in the modern world. To obtain accurate scientific data on the scale of historical and cultural monuments, a modern interpretation of this term is required. This article analyzes the genesis of the phenomenon, the etymology of the term "historical monument", the specifics of the evolutionary process in the framework of historical milestones in the context of museum research, which emphasizes the modern concept. The new formulation of the model of a monument of history and culture, which is one of the popular definitions of the terminology of museum research, requires careful analysis to fully understand the quintessence of this phenomenon. Extensive research in this area confirms that the definition of "monument of history and culture" developed in a special way in the process of evolution. In this regard, the main objectives of the study are the history of the origin of the definition, its etymology, various shades of its meaning and features of the formulation. The main arguments of the modern essence of this phenomenon, according to the authors, begin with a terminological explanation of the word "monument", which forms the core of this term and is the aim of studying this article.

Key words: monument, cultural heritage, cultural value, museology, study of monuments.

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**Тарихи-мәдени ескерткіш:
терминнің қазіргі заманғы түсіндірмесі**

Тарихи және мәдени ескерткіштерді мәдени мұраның бірлігі ретінде сақтау қазіргі әлемдегі ең өзекті мәселелердің бірі болып табылады. Тарихи және мәдени ескерткіштер шкаласы бойынша дәл ғылыми деректерді алу осы терминнің заманауи түсінігін талап етеді. Бұл мақалада құбылыстың генезисі талданады; терминнің этимологиясы; эволюциялық үдерістің тарихи кезеңдер шеңберіндегі, мұражайлық зерттеулер контексіндегі ерекшелігі, бұл қазіргі заманғы тұжырымдаманың маңыздылығын көрсетеді. Мұражай зерттеу терминологиясының танымал анықтамаларының бірі болып табылатын тарих пен мәдениет ескерткіші үлгісін қазіргі заманға сай қалыптастыру осы құбылыстың квинтэссенциясын толық түсіну үшін мұқият талдауды талап етеді. Осы саладағы ауқымды зерттеулер «тарихи және мәдени ескерткіштің» анықтамасы эволюция процесінде ерекше түрде дамығанын растайды. Зерттеудің негізгі мақсаттары – анықтаманың пайда болу тарихы, оның этимологиясы, әр түрлі реңктері және оның ерекшеліктері. Осы құбылыстың қазіргі заманғы мән-мағынасының негізгі дәлелдері осы терминнің негізін құрайтын «ескерткіш» сөзінің терминологиялық түсініктемесінен басталады.

Түйін сөздер: ескерткіш, мәдени мұра, мәдени құндылық, мұражай, ескерткіштерді зерттеу.

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**Историко-культурный памятник:
современная интерпретация термина**

Сохранение памятников истории и культуры как единицы культурного наследия и как понимание соответствующего культурного феномена является одной из самых актуальных глобальных проблем в современном мире. Для получения точных научных данных о масштабах памятников истории и культуры требуется современная интерпретация этого термина. В данной статье анализируется генезис явления, этимология термина «памятник истории», специфика

эволюционного процесса в рамках исторических вех в контексте музейных исследований, что подчеркивает современную концепцию. Новая формулировка модели памятника истории и культуры, которая является одним из популярных определений терминологии музейных исследований, требует тщательного анализа для полного понимания квинтэссенции этого явления. Обширные исследования в этой области подтверждают, что определение «памятник истории и культуры» развивалось особым образом в процессе эволюции. В связи с этим, основными целями исследования являются история происхождения определения, его этимология, различные оттенки его значения и особенности формулировки. Основные аргументы современной сущности этого явления, по мнению авторов, начинаются с терминологического объяснения слова «памятник», которое составляет ядро этого термина и является целью изучения этой статьи.

Ключевые слова: памятник, культурное наследие, культурная ценность, музееведение, изучение памятников.

Introduction

The term ‘monument’ has long since become an everyday word in Europe and has been adequately reflected in legislation, academic literature and the museum experience. There are around seventy legal acts that regulate the protection and preservation of historical and cultural monuments in the European Union and Council of Europe.

The International Council on Monuments and Sites (ICOMOS) signed a statute at its 5th General Assembly. As written in section of Article 3 of the Statute, Definitions:

The term ‘monument’ shall include all structures (together with their settings and pertinent fixtures and contents) which are of value from a historical, artistic, architectural, scientific or ethnological point of view. This definition shall include works of monumental sculpture and painting, elements or structures of an archaeological nature, inscriptions, cave dwellings and all combinations of such features. (International Council on Monuments and Sites, 2014:20)

Analysis of the etymology of the terms for ‘monument’ in different languages proves that they all derive from the same source – ‘memory’. The fact that this term is expressed by the words *pamyatnik* in Russian (the root of the word is *pamyat*, which means ‘memory’, ‘remembrance’); *monument* in European languages (from the Latin word *moneo*, which means ‘I remind’, ‘I recall’) and finally *anıt* in Ottoman Turkish (which means ‘to remember’) proves that this idea is directly connected to memory. But it also allows us to believe that it has evolved from its original essence to a term with new meaning.

Researchers T.M. Mironova (Mironova, 2000:77) and G.V. Lebedova also highlight the memory’s role in the creation of meaning during the formation of the perception of ‘monument’. The etymology of the Azerbaijani word *abide* originates with the Arabic word *abid*, which means

‘one who prays’, ‘one who has faith’ (<http://art-con.ru/node/847>). A question arises: what caused the word *abid* to become *abide*, which was then translated as *pamyatnik* and ‘monument’, which are completely different in meaning? In other languages the etymology of ‘monument’ relates to ‘memory’. So why is it connected to religious belief in our mother tongue? Meanwhile in modern Arabic what we call *abide* (statue, monument) is referred to as *nush*, not *abid*. In checking *abide* in encyclopaedias, we did not encounter references to religious belief in describing the meaning of the word (with the exception of memorial gravestones, tombs etc!). In researching the bonds connecting *abid* with the concept of ‘memory’, let us consider the substance of the activity of the *abid* as one who prays. We can state that for any believer the most important form of practise of their faith is praying. And the most important rule of prayer is remembrance of God. Since the earliest of times, remembrance has been one of the procedural acts of belief in the prayer of a believer in all religions.

Discussion: According to the argument propounded by the theory of cultural perpetuation that has become a part of the history of culture studies, perpetuation has always been of essence in the creation of monuments (*abide*). Sigmund Freud, noting the significance of this argument, wrote:

The memorials and monuments, with which we adorn our great cities, are memory symbols (Schmidt, 1976a:11).

As time passes people begin to appreciate memorials as sacred places and to create an affective bond with them. The conception not only of *abide* (memorial), but also of *pamyatnik* and ‘monument’ in a narrow context, as examples of sculpture and architecture, is also very often linked to this argument. This indicates that the primary status of *abide* was at an everyday mundane level. If in our everyday conversations we refer to any mid-level architectural building or piece of sculpture as *abide* (monument), then the concept is at a mundane level. However,

a new-level conception of ‘monument’ was formed within the concept of the passage of time, wherein ‘memory’ played was the main creator of meaning. As historical memory became a source of information represented by monuments, the monument took a new direction, from the everyday to having official status within society. From then on the monument (as a created work) ceased to be regarded merely as a work created by one person or group, or a natural monument existing independently of human effort, but as a paradigm of a social phenomenon that has informational potential. By defining ‘monument’ as a “data carrier of social significance” in the *Dictionary of Museum Terminology*, the modern status of ‘monument’ in society began to be defined by its official status (<http://www.museum.ru/rme/dictionary.asp?117>). “Monuments are phenomena that preserve social memory”, “Monuments are the confidants of history!” are two of the most widespread scientific expressions of our times.

Research reveals the dynamics of the modern perception of the term ‘monument’ in the different expressions at different stages of history: in the early 20th century this phenomenon was called, the ‘revolutionary monument’ (the October Revolution in Russia), after the 1930s ‘historical monument’, from 1948-1960s the ‘cultural monument’. The term ‘historical and cultural monument’ was established for the first time in the 1965 law on the establishment of the All-Russian Society for the Preservation of Historical and Cultural Monuments. It became law in the the RSFSR in 1978 as the “On the Protection and Use of Monuments of History and Culture”. This law defined ‘monument’ as follows:

Monuments of history and culture include buildings and objects of tangible and intangible creative work of historical, scientific, artistic or other cultural value connected to historical events in the life of a nation, society or country.

The famous monumentalist A.M.Kulemzin described the historical and cultural monument as follows in his research paper, “The Protection of Monuments in Russia as a Historical-Cultural Event”:

Historical and cultural monuments are objects that have appeared as a result of historical and cultural events or those that concentrate traces of influence and true knowledge, being either historical or aesthetic information (Klebanov, 2012).

The term *monument of history and culture* is a highly advantageous expression in seeking to grasp the depth of the essence of this phenomenon. However, it would be incorrect to assume that all countries use it as a rule in their legislations. For example, in legislation in Russia, where the science of

monument studies was established, the expression used is *objects of cultural heritage*, in the USA and France *historical monuments*, in Italy *cultural values*, in Norway and Greece *cultural heritage* and it is simply *monument* in Poland. The objects have the same meaning. However, such variety of description means that there is an urgent need to describe them by one universal term. The absence of a common denomination here is seen as lack of interest by international organizations connected to UNESCO. We should note that terms such as *monument*, *cultural heritage*, and *cultural value* are more common than the expression *monuments of history and culture* in UNESCO documentation. Priorities in the protection of cultural and natural heritage, by now a global problem, include an urgent once-and-for-all resolution of this issue.

Apart from natural monuments (with the exception of the anthropogenic factor!), the transformation of objects of outstanding potential value in any area of human creativity or social life to the status of monuments of history and culture may be considered an objective process. Thus in law the status of *monument of history and culture* is bestowed upon objects of historical-cultural and even natural heritage that are of special value to society. Both contexts of the term *monument* lie within the scope of museum studies. However, legal status is of greater importance. The legal status of monuments of history and culture relates to the means by which they are protected. We note that researchers who study the legal aspects of monument protection, such as M.M.Boguslavsky (Boguslavsky, 2005), I.E.Martinenko (Martinenko, 2005a), L.R.Klebanov (Key Terms of Museum Studies, 2010), A.B.Shukhobodsky (Schmidt, 1976b), A.P.Sergeyeva (Sergeyeva, 1990), and others, all insist on a thesis for a special protection regime for objects categorised *monuments of history and culture*. The researcher L.R.Klebanov wrote: *Monuments of history and culture, considering their special cultural importance, are the cultural values that are included in state registration (inclusion in a special list or catalogued registry) based on expert evaluation from government (Key Terms of Museum Studies, 2010a:23)*. The same thesis is proposed by I.E.Martinenko: *Monuments are cultural values that are included in state protection by state registration and under a special regime of protection and use (Martinenko, 2005b: 13)*.

These theses represent the new context for the definition of monuments. Previously, all those who studied monuments of history and culture in the context of philosophy, culture studies, art studies

and sociology, concentrated on the argument concerning the historical and cultural information they represented. Arising from this perception of value and relevance to society, P.Boyarsky and A.Dyachkov founded the discipline of monument studies in Russia in the late 1980s. They went further than just the perception of monuments at a social level, approaching them as the tangible social wealth that was in crucial need of discovery and protection. The idea of monument studies emerged long before the science. The elemental and spontaneous perception of the social significance of monuments and the need to protect them developed out of practice. Researchers studying history with respect to objects as information bearers proved scientifically the mutual relation between historical processes and monuments. That is precisely why those researchers not only discovered monuments, but also raised the question of their protection. P.V.Boyarsky, the founder of monument studies, defines monuments of history and culture thus: *Monuments of history and culture are the total collection of tangible objects and monuments (remembrance sites) that make*

up relative concatenation and reflect all aspects of historical development of human society in the biosphere system (Boyarsky, 1986:127).

A.N.Dyachkov revealed all the significant features of monuments of history and culture. Insisting that ‘monument’ is a source of historical-cultural information, the author noted that this relates to a society’s approach towards the historical-cultural object: *Would it not be correct to search for a definition of the monument phenomenon in the historical-cultural value of an object that makes it a monument?*

Only the historical-cultural objects that are recognised by the society gain the status of a monument and *either they play the role of monuments or fulfil the functions of monuments*. Proceeding from this assumption, Dyachkov gives his own definition of a monument of history and culture: *A monument of history and culture is a function of the elements of the objective world of culture selected for its transfer of cultural and technological traditions of public interest and significance from the past into the future (Dyachkov, 1987:43).*

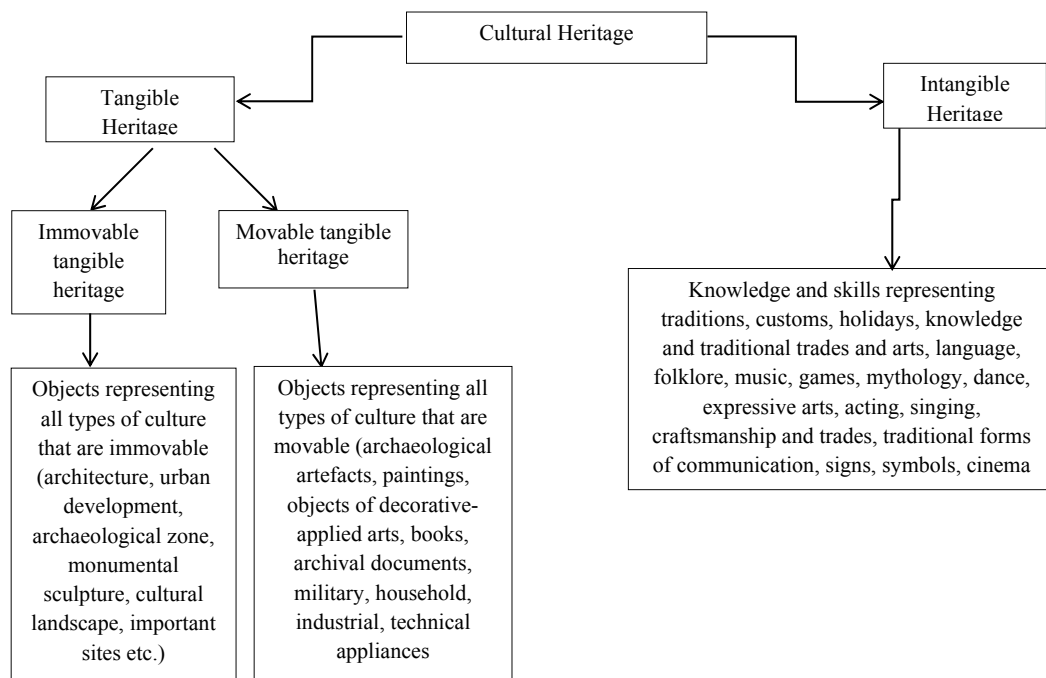


Figure 1 – Dichotomous classification of cultural heritage

This definition highlights the feature of monuments of history and culture that creates a relationship between the past and the future and hints at their informational, semiotic and communicative

aspects. These definitions, based purely on the principles of monument studies, clarify the social significance of monuments of history and culture. Monument studies is a discipline dedicated to

knowledge of monuments of history and culture. This discipline studies those monuments as a special kind of cultural-historical and natural heritage. The main criterion for bestowing the status of *monument of history and culture* is for the object to be of special value. This implies the need to consider the comparative correlation of *cultural heritage* and *monument of history and culture*. The interpretation and analysis of these phenomena are of objective significance in the development of conceptions of 'monument'. Researcher I.E.Martinenko also believes that it is vital to analyse 'monument' within the correlation of *cultural heritage* and *cultural values* (Martinenko, 2005c:13). These phenomena although they are from the same source and bear relative features, nevertheless are not identical in essence. It is absolutely crucial to research the relation between these phenomena. In his research in, *The Status of Monuments of History and Culture in Modern Russia*, B. Shukhobodsky proposes that

heritage, cultural value and *monument* have acquired their hierarchic status as a result of differential transformation (Shukhobodsky, 2012:12). He says that cultural heritage occupies the primary level in this hierarchic system. We support this thesis because *cultural heritage* is an aggregate of wider scope than *monument of history and culture*. It is important to keep in mind that cultural heritage itself (or cultural-historical heritage) derives from the general heritage. Heritage is broader in meaning and is the vast total of the culture acquired through inheritance and passed down the generations. *Heritage* is defined in the following manner in the *Dictionary of Key Terms of Museology: Heritage should be understood as all tangible and intangible objects and groups of objects that are known as historical memory and proof according to its value and which can be preserved and collected* (Key Terms of Museum Studies, 2010b).

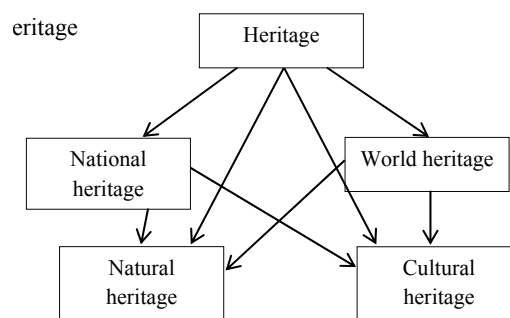


Figure 2 – The structure of heritage

The charts reflecting the structural classification of cultural heritage allow us to imagine that cultural heritage is a phenomenon of colourfully diverse composition. This composition also indicates that cultural heritage has dichotomic qualities: tangible, movable and immovable and intangible. This, in turn, questions the scientific-methodological, even the practical essence, of the thesis of the majority of monumentalists (P.Boyarsky, A.Dyachkov, A.Kulemzin, A.Griffen) on the transformation of only tangible and immovable values into the status of *monument of history and culture*. If the basis for bestowing the status of a monument of history and culture is heritage (cultural-historical, natural), then it would be objective to include not only tangible and immovable values, but also intangible and movable heritage. Thus there is no scientific falsity in recognising any component of heritage (cultural,

natural) with rich potential as having the status of *monument of history and culture*. As *monument studies* selects historical and cultural monuments of all categories (tangible and intangible, movable and immovable) as objects of research, it might provide for its future development as a fundamental scientific discipline. The object's value potential rather than any dichotomous feature should be the main criteria for the status of historical and cultural monument. This argument is held unanimously in the theses of all researchers who study the status context of a monument. All researchers study the phenomenon in the context of historical and cultural importance. No object can be transformed into a *monument of history and culture* if its value has not been decided. In museum studies, in which the historical and cultural monument is the object of research, museality is accepted as an equivalent of an

object's value potential. The museality of an object is defined according to the object's value potential. Museality is a term that has recently entered modern museum terminology. Czech museologist Zbynek Stransky's concept of the development of a museum approach towards events has been greatly influential in propelling this term into scientific circulation. Stransky's concept was expressed in his research paper "The Nature of Museology", published in Brno in 1974. Criteria such as semantic, axiologiness and informativeness are of great significance in the origins of a museal approach to the environment. The Czech museologist sees the properties of tangible and intangible objects in an environment that can create "museum interest" in people as the first phase of the "museum approach". *Museum demand, museum interest, museum value* – all are primary elements of the museum approach. This author defined for the first time the morphology of museality, which now circulates in theoretical museology, based on such fundamental terms as *museum demand* and *museum value*. Zbynek Stransky based his considerations on an understanding of the value an object carries in selecting and documenting museum-significant events and processes (Stransky, 1981). Thus the research included the term *museum* into *museal space* context and prefers "a museum without walls" to "museum institute". This idea is the essence of the concept 'Imaginary Museum' formed by Andre Malraux, French Minister of Culture of France.

Malraux regards the imaginary museum as the last phase of the metamorphosis created by the 'real' museum (Kalugina, 1987:159). He stressed that technological capacity, for example photography,

is a great tool in creating this boundlessness. A photographic reflection of a piece of art inside or outside a museum, he said, or a film made by a great actor, or the recorded voice of a singer, are also examples of an "imaginary museum". Thus Andre Malraux too replaced the traditional (in our world it may even be called a stereotype!) opinion to keep museality within the borders of museums with a new post-modernist metamorphosis.

Conclusion

This concept and its idea of a "museum without walls" is of decisive significance in placing the *monument of history and culture*, the object of the present paper, as a museal phenomenon and in taking a broad perception of its scope. It means that any object (tangible or intangible) may logically and imminently be transformed into a *monument of history and culture* on condition that it possesses the value potential deemed necessary for this status. The fact that the value potential of the object is the essence of an approach to the "history of history and culture", the main object of research in both monument studies and museology, in evaluating status is thus proved. "Value potential" is the fact that an object simultaneously manifests several value criteria. Thus the analysis proves that a *monument of history and culture* is a specialised category. The main factor that accords such specialisation is the level of value potential possessed by the cultural heritage object of that status. This is the main argument of those who present a *monument of history and culture* as a legal status.

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