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CONCEPTS OF MUSEALISATION OF ARCHITECTURAL HERITAGE

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Abstract

The modern musealisation of architectural heritage requires a balance between preserving authenticity and adapting to its new functions. However, existing approaches are not systematized, which leads to subjectivity and inconsistency in decision-making. **As a result** of the research, a periodic model of physical musealisation concepts has been developed, systematizing groups of architectural elements (object, structure, interior, facade, plan, territory) and intervention approaches (preservation, restoration, adaptation, renewal, addition, substitution, removal). Correlations between the physical characteristics of objects and permissible strategies have been identified, and terminology for new musealisation concepts has been introduced. The introduction of a new status for architectural heritage is proposed — Objects of Cultural Interest (OCI), which will fill the gap between Objects of Cultural Heritage (OCH) and ordinary buildings. The higher the value category of an object (OCH), the narrower the range of permissible transformation strategies and vice versa, the lower the status (OCI), the wider the range of possible changes. The research creates a theoretical foundation for decision-making in musealisation projects, bridging the gap between theory and practice of heritage revitalization into museums, and also offers tools for working with objects of various types and degrees of preservation.

Keywords: musealisation; concept model; Objects of Cultural Interest (OCI); Objects of Cultural Heritage (OCH).

Introduction

Currently, the concept of “musealization” is still at the stage of formation in modern science (Kimeeva, 2022). Approaches to the musealisation of architectural heritage are developing amid a growing contradiction between the need to preserve the material authenticity of objects and the requirements for their adaptation to current socio-economic conditions. This process, which involves the transformation of historical buildings into museum objects, requires fundamentally new systemic solutions capable of overcoming the existing gap between theoretical principles and practical implementation.

The analysis of publications from the last decade reveals significant gaps in systematizing musealisation methods: theoretical works by Jokilehto (1986) and Bobrov (2017) focus on the philosophical aspects of conservation theory but do not offer practical tools for classification, whereas technical studies by Zhang (2024) and Krasilnikova (2025) examine individual technologies, such as laser scanning or BIM modelling, but do not establish links between the physical characteristics of objects and permissible interventions. Existing international standards (Venice Charter ICOMOS, 1964; Krakow Charter, 2000) provide important ethical guidelines but lack tools for selecting strategies in specific design solutions. This leads to a situation where each complex case of musealisation requires the invention of new approaches, which significantly increases time and financial costs, as well as generates professional conflicts.

In this context, the present research aims to develop an interactive periodic system of musealisation concepts that will allow:

– systematize existing concepts of architectural heritage musealisation according to their impact on the material elements of the object;

– identify the key parameters determining the choice of a musealisation concept;

– establish correlations between the physical characteristics of monuments and the range of permissible interventions.

Methods

Currently, research on the musealisation of cultural heritage objects and the historical environment is conducted primarily in three disciplines: museology, archaeology, and the architectural-urban planning sphere. The absence of a unified systematizing tool leads to subjectivity, contradictions in design solutions, and risks of harming heritage. This research is based on the analysis of musealisation design solutions in Europe, Asia, and the CIS countries. The research algorithm is structured according to the following principles:

– abstraction from certain properties of museums and musealisation zones whose area of responsibility lies primarily not in the architectural sphere but in museology, cultural studies, or archaeology;

– analysis of the theoretical research base or secondary data, i.e., scientific works

of predecessors in this field, to avoid repeating hypotheses and to generate new scientific knowledge about the research subject;

– identification of the hierarchy of architectural elements of the object, approaches to possible physical intervention in the architecture of objects for museum creation, and establishing patterns of approach / element / classification of the musealisation object;

– synthesis of the identified data into a periodic model of physical musealisation concepts;

– application of induction methods (from particular cases to general classification principles) and deduction (from established principles to formulating terms and rules for new situations).

The presented examples of musealisation objects were evaluated from the perspective of architectural transformations of their individual elements and the physical actions required for these transformations. The results of these evaluations are presented in a table and are colour-coded according to the permissible uses of categories of architectural heritage, thereby bridging the gap between theory and practice.

Results and Discussion

The analysis of the implemented projects has revealed stable patterns in the musealisation of architectural heritage, on the basis of which a periodic model of concepts was developed. The structure of the model, analogous to the chemical system of Mendeleev's table, is organized according to the principle of increasing intensity of impact — from classical conservation to radical dematerialization. The periodic model of musealisation concepts (Fig. 1) demonstrates a clear dependency between the value of object elements, intervention approaches, and their possible connections.

Alongside the term "Object of Cultural Heritage" (hereinafter OCH), the introduction of a new legal status for potentially valuable objects is proposed — "Object of Cultural Interest" (hereinafter OCI), which serves as an intermediate link between OCH and ordinary buildings. The OCI possesses presumed value (historical, architectural, urban planning, social, etc.) but is not included in official protection registers. This status, analogous to "Buildings of Local Interest" in Cambridge, protects the object from demolition and the problems of "non-obvious heritage", providing flexibility in the management and architectural transformation of the object (Building of Local Interest, 2025). Thus, the gradation of permissible intervention approaches in relation to the status of the object is divided into three legends:

– orange: concepts suitable for OCH of any level and for OCI;

– green: concepts suitable for regional and local levels and for OCI;

– grey: concepts suitable only for OCI.

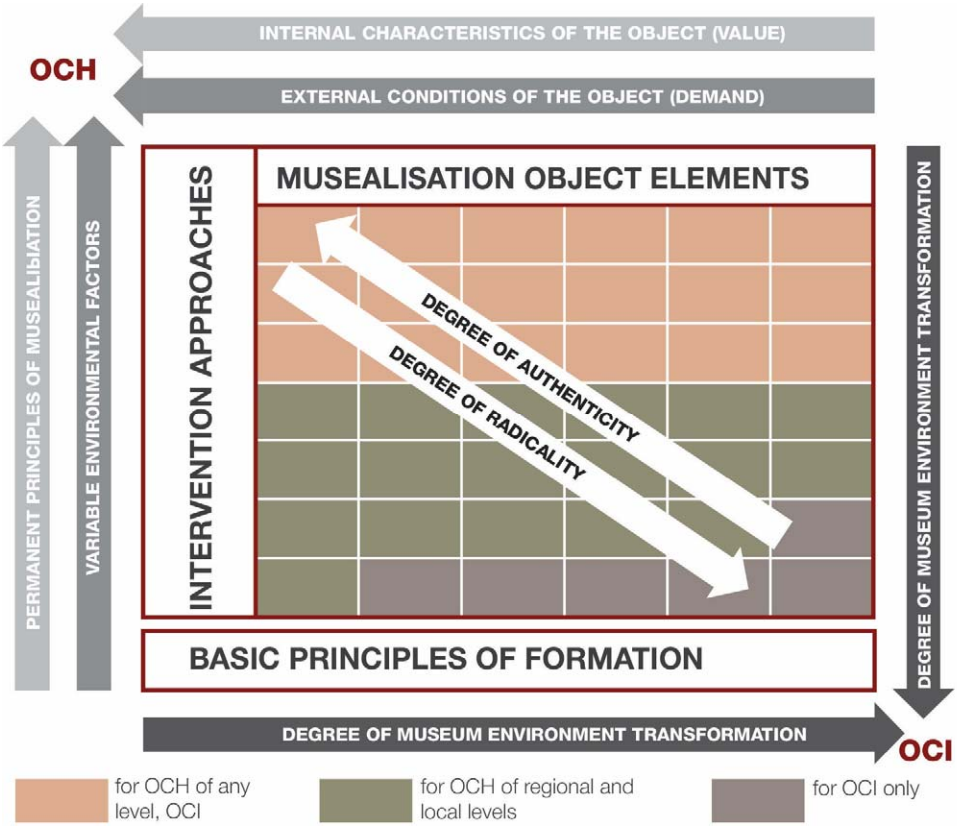

Fig. 1. Model of logical connections of musealisation concepts for architectural objects

Thus, the model classifies and establishes the dependency of various properties of object elements on the "charge" of their changes. Changes within a group (from bottom to top, from OCI to OCH): the degree of transformation of the historical environment decreases, while the constant principles of musealisation and variable environmental factors increase. Changes within periods (from right to left, from OCI to OCH) are: the degree of transformation of the historical environment decreases, while the internal characteristics of the object and external conditions of the object increase. Changes along the diagonal (from OCI to OCH) are: the degree of transformation of the historical environment decreases, while the degree of authenticity increases.

According to Russian federal law "On Objects of Cultural Heritage", OCH can be divided into three types: monuments, ensembles, and sites of interest. However, in many cases, existing historical environment territories are not territories of architectural ensembles or sites of interest, but rather a collection of individual monument objects from different periods and scales, which leads to their logical selection as the basis for a research unit (Alekseev et al., 2012). Similar to research in chemistry or physics, scientists delve deeper into the "molecular" structure of studying objects and phenomena. Furthermore, Ponomareva's dissertation on the musealisation of the urban environment (Ponomareva, 1994) subjected the monument to division into individual elements, each carrying its own value and characteristics, which can now be supplemented and presented as **groups of the model** — vertical columns classifying concepts according to object elements, which can be divided into 2D (planar) and 3D (volumetric) ones:

– 3D object: a building that is an Object of Cultural Heritage (legalized or to be identified in the future), with a wide range of valuable qualities: historical, architectural-urban planning, etc.

– 3D interior: the internal environment of the object, forming an ergonomic and emotionally rich atmosphere appropriate to its purpose, including interior design, finishes, object furnishings, overall concept, etc.

– 3D structure: the interconnected set of vertical and horizontal load-bearing structures of the object, ensuring its strength, rigidity, and stability, including the type of structures, materials, engineering solutions, etc.

– 2D facade: the external enclosing structure of the building, performing aesthetic, protective, and communicative functions, including composition, materials, decorative elements.

– 2D plan: the organization of the internal space of the building, determining the relationship between rooms, their functionality, and usage scenarios.

– 2D landscape: the natural-anthropogenic environment surrounding the object of cultural heritage or cultural interest, historically and functionally linked to it as an integral part, including: relief, vegetation and water elements, small architectural forms, etc. (GOST R 56891.4–2016).

The hierarchy of intervention levels is primarily displayed as a gradation of the main concept — as described by Jokilehto with four levels of preservation (conservation → restoration → reconstruction → → recreation) (Jpokilheto, 1986) or through the lens of basic strategies, as in Shchenkov's works (ruin conservation → stabilization → fragmentary restoration → complete restoration → adaptive regeneration) (Schenkov, 2004). Often, the main approach to heritage preservation through restoration is classified according to individual actions on object elements, as in Shumilkin's research (archaeological, synthetic, and stylistic restoration) (Shumilkin, 2023). Such research has been conducted in the context of preserving historical buildings without provisions for museum perspectives. However, together with the analysis of implemented musealisation projects, they allow us to see the global essence of possible changes, which can be expressed in the form of periods of the model — horizontal rows classifying concepts according to the essence of intervention:

– preservation — approaches to protecting and maintaining the object in its original discovered state, aimed at ensuring the physical integrity, authenticity, and value of the object;

– restoration — approaches aimed at recreating and ensuring the pristine condition and authentic value of the object based on historical data and research;

– adaptation — approaches aimed at improving the understanding of the object's value, emotional perception, involvement in the socio-cultural context of the environment, but without irreversible intervention;

– renewal — approaches aimed at modernizing or rebooting the object to ensure contemporary use;

– addition — approaches aimed at incorporating new permanent or temporary elements that can expand the useful area of the building, improve operating conditions, or other criteria of the object;

– substitution — approaches aimed at substituting lost or irreparable elements of the object, either matching the original or a new architectural vision that enhances the attractiveness and value of the object;

– removal — approaches aimed at dismantling elements of the object due to unavoidable circumstances.

The cells of the model are the concepts of musealisation of architectural heritage — the main paths, ideas, or conceptions for solving the problem underlying the design of architectural-spatial environments (Fig. 2). The terminological hierarchy

INTERVENTION APPROACHES	ELEMENTS OF THE MUSEALISATION OBJECT					
	3D			2D		
	OBJECT	INTERIOR	STRUCTURE	FACADE	LAYOUT	LANDSCAPE
PRESERVATION	integrated conservation	interior conservation	structural conservation	facade conservation	layout conservation	landscape conservation
RESTAURATION	integrated restauration	interior restauration	structural restauration	facade restauration	layout restauration	landscape restauration
ADAPTATION	integrated adaptation	interior adaptation	structural adaptation	facade adaptation	layout adaptation	landscape adaptation
RENEWAL	integrated renewal	interior renovation	structural renovation	facade renovation	layout renovation	landscape renovation
ADDITION	integrated reconstruction	interior reconstruction	structural reconstruction	facade reconstruction	layout reconstruction	landscape reconstruction
SUBSTITUTION	integrated substitution	interior substitution	structural substitution	facade substitution	layout substitution	landscape substitution
REMOVAL	cultural translocation	interior translocation	structural translocation	facade translocation	layout translocation	landscape dematerialisation

BASIC FORMATION PRINCIPLES	sustainable development	contextual insertion	technological implementation	digital promotion	inclusive visiting	flexible functioning

for OCH of any kind, OCI

for OCH of regional and local levels, OCI

for OCI only

Fig. 2. Periodic model of physical musealisation concepts

is: vertically, increasing activity (from protection → → to transformation → to removal); horizontally, increasing the scale of impact (from the whole → to elements).

The proposed terminology system unites traditionally established concepts, contemporary expressions, and new borrowed terms reflecting modern approaches to the transformation of architectural heritage. Established concepts have already firmly entered the professional lexicon of architects or archaeologists and require no additional explanation, as their meaning is enshrined in regulatory documents and scientific literature: conservation, restoration, reconstruction, renovation. Contemporary terms require clarification for this research, as they are not enshrined in regulations but have been actively used in publications or project activities in recent decades:

– revitalization (Latin “re” — renewal, “vita” — life) — the process of renewing and enlivening urban space, unlocking new possibilities for old territories (Anisimova, 2018);

– substitution (Latin “substitution” — substitution, replacement) — the process of replacing existing elements or structures with new ones, substituting one element for another that occupies a similar position in the object and performs an equivalent function (Sobotka et al., 2021);

– translocation (from Latin “trans” — across, “location” — placement) — the physical relocation of an object and / or to a new location, preserving material and historical integrity with irreversible intervention and museum use (Şahin and Tutkun, 2020);

– dematerialization (Latin “dematerialization” — depriving of materiality) — the process of physical liquidation of a specific historical territory, as a result of which its value is preserved and exists only in the form of documents, records, archives, etc. (Shemyakin, 2024; Frey and Kirshenblatt-Gimblett, 2002).

The model of musealisation concepts for architectural objects has structural and logical parallels with the periodic table of elements, but with a fundamentally different purpose — not the classification of chemical elements, but the systematisation of methods for transforming objects of cultural heritage or cultural interest into objects of museum display. While Mendeleev’s periodic table reflects the immutable laws of elements, the table of musealisation concepts represents variable design strategies, where the hierarchy of values may depend on the cultural context. The basic principles of forming a musealised space are highlighted in a separate row, as they represent universal trends of our time. Just as in chemistry the laws of thermodynamics do not fit into the cells of the periodic table but govern the behaviour of all elements, these principles are not tied to specific approaches but set the general framework for any musealisation project, ensuring its compliance with modern cultural, technological, social, and other requirements.

These principles include:

– sustainable development — in the context of musealisation, a principle based on the position of culture as a key factor in achieving the SDGs, contributing to social integration, economic growth through creative industries and cultural tourism, and the full integration of culture into national and international development strategies, according to the Valletta Principles of 2011;

– contextual integration — a principle based on the need for harmonious embedding of the object into the surrounding environment, which implies visual consistency with the historical landscape, functional interconnection with infrastructure, and semantic continuity (Krasilnikova, 2025);

– technological implementation — a principle based on the integration of modern technical solutions into the process of managing or preserving the object, including engineering innovations (automated climate control systems, monitoring sensors, thermal imagers, etc.), digital tools (BIM modelling, laser scanning, etc.);

– digital promotion — a principle based on the use of virtual technologies to expand the possibilities of presenting the object, providing for the creation of digital archives, the development of interactive formats (VR / AR tours), the organization of online access to museum collections, etc.;

– inclusive visiting — a principle based on ensuring equal access to cultural heritage and museums for all categories of visitors, which implies architectural accessibility, cognitive inclusion, social engagement, etc.;

– flexible functioning — a principle based on the ability of the musealized space to adapt to changing conditions, including functional transformation of spaces, modular organization of exhibitions, dynamic programming of cultural events, etc. (Pérez 2022).

The methodology for applying the model of musealisation concepts is based on 6 steps:

– step 1: determining the value category of the object; identifying whether it is an Object of Cultural Heritage of federal, regional, local significance, or an Object of Cultural Interest.

– step 2: decomposition of the object into element groups. Visual, historical, and scientific analysis is conducted to assess the value of each group: object (as a whole), interior, structure, facade, plan, landscape.

– step 3: assessment of the physical condition. Determining the degree of preservation of each valuable element and the possibility of its preservation.

– step 4: selection of permissible strategies based on the model matrix. The value category (step

1) determines the “permissible palette” of strategies (intervention approaches): preservation, restoration, adaptation, renewal, addition, substitution, removal. The higher the status, the narrower the spectrum.

– step 5: concept development: correlating the chosen strategies with the new museum function. Both a general idea and a package of solutions for each group of elements are formulated.

– step 6: verification against musealisation principles. Evaluation of the concept and discussion: controversial decisions, deviation from the recommended range of strategies, loss / gain balance, prediction of consequences.

Each musealisation concept presented in the table can be illustrated with specific examples (Fig. 3), demonstrating its application in real projects. For example, preservation (conservation) of historical facades during the construction of “Tishinsky Boulevard” in Moscow emphasizes the priority of authenticity and historical memory, while renewal (renovation) of the facades of historical houses in the Paper Museum in Dongshan Village, China, reflects adaptation to modern functional requirements and cultural context. Adaptation (revitalization) of ruins in the case of the Columbus Museum in Germany allows the ruined elements to be presented as part of a new interior space without harmful physical intervention, and addition (reconstruction) of glass lifts in the St. Olaf Tower of Vyborg Castle in Russia illustrates the harmonious integration of new engineering elements into a historical context. These examples not only confirm the universality of the proposed classification but also show how the choice of concept depends on the type of value of the object, the specific element of the object, and the level of the heritage object subject to transformation.

As an object for analysis, consider the Basilica Cistern in Istanbul. This masterpiece of 6th-century Byzantine engineering, known as the “Sunken Palace”, is comparable in status to an Object of Cultural Heritage of federal significance in Russian practice. Consequently, all orange-coloured concept cells are available to it, representing the gentlest intervention approaches. Visual analysis of the heritage’s physical appearance shows that the object does not possess valuable facades or surrounding landscape, as it is hidden underground, nor does it have valuable interiors or planning solutions due to its functional purpose as a reservoir. The key and unique value of this heritage lies in its structural-engineering solution: the vaulted ceiling of the cistern is supported by 336 columns brought from various ancient temples. Hence, the choice of musealisation object elements narrows down to the “structure”, and the intervention approaches remaining are: preservation, restoration, and adaptation. The Basilica Cistern used all three strategies: part of the structural system underwent extensive conservation to avoid collapse due to new construction and infrastructure above the reservoir; some columns and capitals were restored, as the site had long been abandoned and polluted; and for new museum use, walkways, lighting, and ventilation systems were added.

When inappropriate concepts are applied to an Object of Cultural Heritage of high value, the resulting solution can be either a failure (the loss of value outweighs the new opportunities) or a success (the new opportunities outweigh the loss of part of the value). The bold case of the reconstruction of the Hermitage General Staff Building by Studio 44 serves as a clear example where the concept goes beyond the limits of permissible architectural interventions and provokes discussion in the professional community. The ambitious project not only restored the facades and covered the inner courtyards with lighting structures but also cut through the internal spaces with through enfilade openings. Such a radical intervention into the structure of a monument included in the UNESCO World Heritage list has garnered both international recognition and public criticism regarding the loss of the value of classical architecture in favour of creating a contemporary museum.

However, not all bold decisions to transform an object for musealisation purposes end successfully. The Turkish government flooded an entire historic city for urbanization purposes, including an open-air museum, archaeological sites, and hundreds of medieval and ancient buildings. The ancient city of Hasankeyf was founded before our era and was part of many states, including the Roman, Byzantine, and Ottoman empires. In 1981, part of the city was declared an archaeological site. The city was not simply flooded but relocated to a new site, attempting to imitate the old settlement. However, the museum, previously located in the city centre, was built on the outskirts and deprived of interaction with the local community. Through removal and relocation, authorities managed to save only eight individual buildings. The concept of translocation of objects with the loss of the authentic landscape as a strategy for preservation and reconciling opposition ended in disaster and became a symbol of “absent heritage”, a constant reminder of a lost culture (Aykaç, 2023).

The presented table is built not only on the hierarchy of classifications of cultural heritage objects and their value (I-historical, II-architectural, III-scientific or technical, IV-aesthetic, V-social) but also on the constant principles of musealisation. The principles of musealisation are based on a hybrid fusion of ICOM and ICOMOS recommendations on restoration (Prutsyn et al., 1990; Ikonnikov, 1985) and musealisation (Kaulen, 2012). Their integration

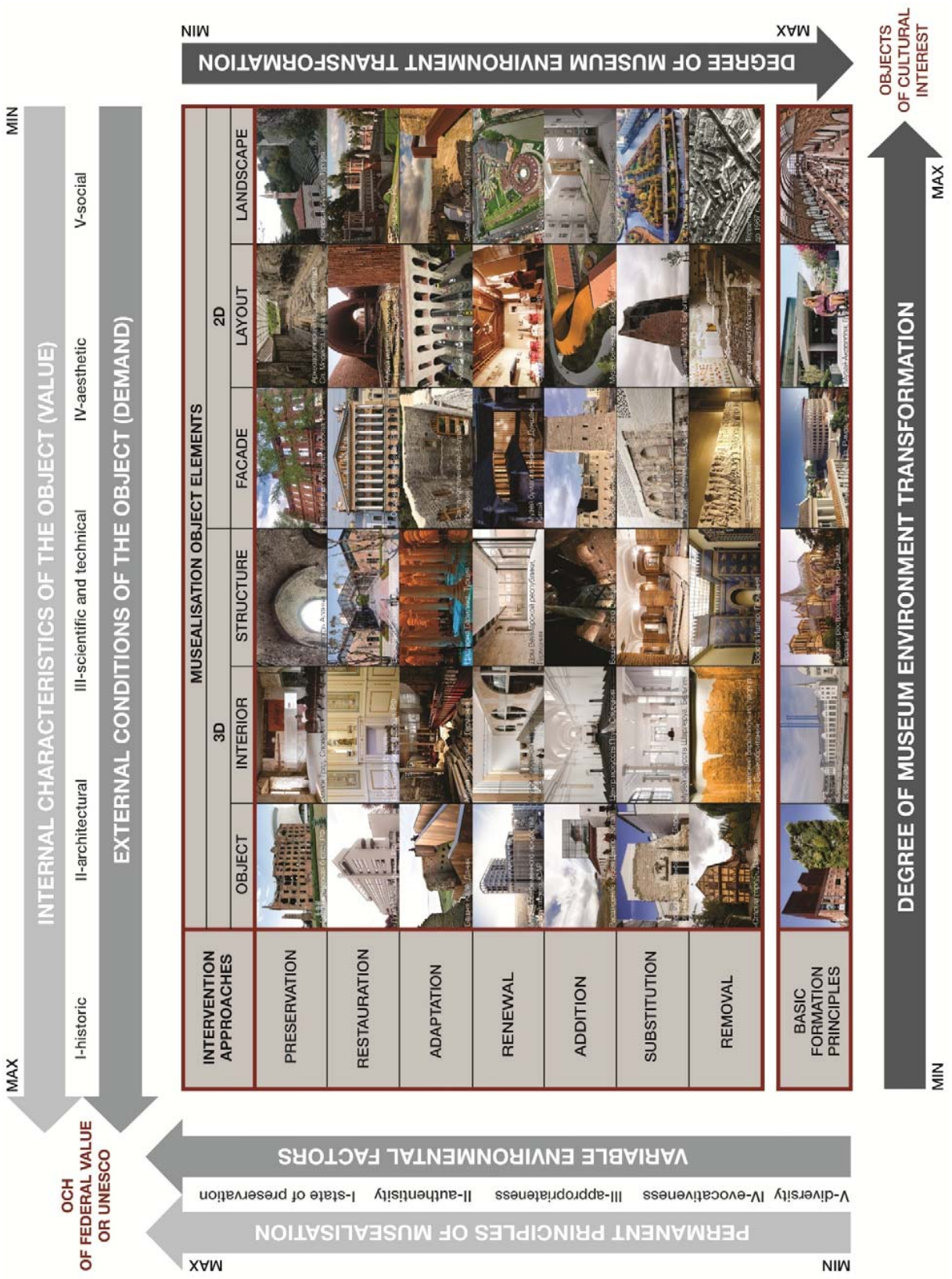

Fig. 3. Periodic model of musealisation concepts with examples

gives rise to a new phenomenon — the conceptual foundations for transforming objects into museums or museum spaces. They serve as a guarantee that the process of architectural transformation maintains a balance between preserving the authenticity of the heritage and its adaptation for contemporary use and perception. The principles can be formulated as follows:

I — Principle of preservation of the object, natural-cultural landscape, and spirit of place. Priority of the physical preservation of the material substance of the monument as the fundamental basis for any action. Any intervention must minimize the risks of loss or damage to authentic elements (ICOMOS, 1964). Exhibition activities must exclude the threat and risk of destruction, ensuring preservation by all possible means (Kaulen, 2012). Musealisation must preserve not only the material structure but also the totality of meanings, the atmosphere, the connection of the object with the surrounding landscape and cultural context (Prutsyn et al., 1990).

II — Principle of authenticity and credibility. Correspondence of musealized objects to the level of scientifically based information about their original appearance. The authenticity and credibility of the environment must be equal to the degree of research, to avoid preserving "false" value (ICOMOS, 1964). All stages of work with cultural heritage objects must be accompanied by documentation describing actions, materials used, etc.

III — Principle of appropriateness. Any intervention in an architectural heritage object must be appropriate in relation to the historical environment, cultural context, significance of the object, and memorial memory (Prutsyn et al., 1990; Ikonnikov, 1985). The principle allows for balanced decisions in "grey areas" where rules or standards do not provide a clear answer. It requires professionals to exercise respect, a sense of proportion, and cultural sensitivity.

IV — Principle of impressiveness. It is necessary not only to preserve architectural heritage but also to enhance its ability to emotionally affect the viewer, to make a strong impression, to convey the spirit of the era and the power of history or culture (Kimeeva, 2022; Ikonnikov, 1985). Without "showmanship", but with the translation of scientific data into the language of emotions and personal discoveries.

V — Principle of diversity in functional-spatial structure. The pursuit of creating a unified but diverse and inclusive natural-cultural landscape, ensemble or object. Extensive use of additional functions alongside core museum functions (trade, catering, sports, recreation, etc.) (Pérez, 2022; Kaulen, 2012). Rejection of universal approaches to concepts.

The development of musealisation methodology implies continuous interaction between the constant and the changing context. Following the constant principles that form the ethical core, the question of variable environmental factors, which constitute the contextual field, inevitably arises. Thus, for an OCI, a permissible solution might be replacing outdated infrastructure with modern facilities to optimize museum access and comfort, as the priority would be activating the social potential of the place. However, for a high-level OCH, such simplification is unacceptable, as each decision requires a comprehensive analysis of the multi-layered context, including: the history of the formation of the environment; socio-functional connections in the past and present; climatic and urban planning conditions; strategic project goals and budget constraints; current regulations and protection standards; engineering-structural possibilities and risks. The two pairs of guiding elements of the model — "value-needs" and "principles-factors" — are in a state of constant interconnection and mutual influence, showing a coordinate system for concept formation and logical connections for making balanced decisions.

Conclusions

This article has examined the periodic model of physical musealisation concepts, which is a practical methodology for the revitalization of historical objects into a museum environment or tourist attractions. Musealisation concepts have come a long way from classical methods of preservation, such as conservation or restoration, to bold architectural transformations, such as substitution and translocation. A key aspect of the scientific understanding of musealisation as a process of transforming space into a museum is the analysis of ways to modify an existing object to form a museum environment. The conducted research has made it possible to systematize the concepts of musealisation of architectural objects in the form of a universal periodic model, where instead of energy levels — intervention approaches, and instead of electrons in the outer energy level — the elements and values of objects. The model of musealisation concepts has made it possible to:

– systematize previously disparate practices into a single logical system;

– visualize the relationship between the value of an object, its physical elements, and permissible methods of work;

– offer flexible tools both for working with valuable heritage (narrowing the choice) and for the creative revitalization of less significant objects (expanding possibilities);

– create a platform for dialogue between conservationists and innovators, ensuring a reasoned balance between authenticity and adaptation.

The introduction of the "Object of Cultural Interest" (OCI) status theoretically substantiates

work with mass heritage, forming a flexible system: OCH (rigid regime) → OCI (flexible regime) → ordinary objects, which is relevant for historical urban environments. The model serves as a connecting link and an "interface" between theory, normative regulation, and real design, offering a much-needed systematic approach in our professional activity for the conscious and responsible transformation of architectural heritage in the face of new cultural challenges.

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КОНЦЕПЦИИ МУЗЕЕФИКАЦИИ АРХИТЕКТУРНОГО НАСЛЕДИЯ

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Аннотация
Современная музеефикация архитектурного наследия требует баланса между сохранением аутентичности и адаптацией к новым функциям, однако существующие подходы не систематизированы, что приводит к субъективности и непоследовательности решений. **В результате** исследования создана периодическая модель физических концепций музеефикации, систематизирующая группы архитектурных элементов (объект, конструктив, интерьер, фасад, план, территория) и подходы вмешательств (сохранение, восстановление, приспособление, обновление, добавление, замещение, изъятие). Выявлены корреляции между физическими характеристиками объектов и допустимыми стратегиями, введена терминология для новых концепций музеефикации. Предложено внедрение нового статуса для архитектурного наследия — объекты культурного интереса (ОКИ), которые восполнят пробел между ОКН и рядовыми сооружениями. Чем выше категория ценности объекта (ОКН), тем меньше спектр допустимых стратегий его трансформации; чем ниже статус (ОКИ), тем шире спектр возможных изменений. Исследование создает теоретическую основу для принятия решений в проектах музеефикации, восполняя пробел между теорией и практикой ревитализации наследия в музеи, а также предлагает инструментарий для работы с объектами различного типа и степени сохранности.

Ключевые слова: музеефикация; модель концепций; объекты культурного интереса (ОКИ); объекты культурного наследия (ОКН).