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ФОРУМ **1**



KNOWLEDGE AND IDEOLOGIES
Europe and the Black Sea Region after World War II

Balkanistic **F**orum '21 БАЛКАНИСТИЧЕН ФОРУМ 1

ИЗДАВА МЕЖДУНАРОДНИЯТ УНИВЕРСИТЕТСКИ
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Europe and the Black Sea Region after World War II

Editor: Petar Vodenicharov

ЗНАНИЕ И ИДЕОЛОГИИ

Европа и Черноморския регион след Втората световна война

Съставител: Петър Воденичаров

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Academic Historiography in Azerbaijan at the Crossroads of Time (1989-1991)

Abstract: *The scientific development in the USSR has come a long way. Despite all the obstacles posed during its formation and development, it has reached a reasonably high level by the mid-1980s. This achievement was mainly in the natural and technical sciences. The progress was determined by the USSR's desire to keep the palm in space exploration, nuclear physics, petrochemistry, and other sciences of strategic importance for the country's development. In these areas, contacts were established with world scientific centers and exchange of scientific achievements took place. As a result, Soviet scientists became winners of prestigious international awards, including the Nobel Prizes.*

As for the humanities and especially the social sciences, the dominance of Marxist-Leninist ideology and the corresponding interpretation of historical events significantly affected the development of Soviet sciences and reaching the world level quality. Until the mid-1990s, political history as an area of science of history, practically, did not exist. The "History of the CPSU" and the "History of the Communist Party of Azerbaijan" virtually monopolized the multifaceted nature of political themes, reducing it to the apologetics of the party history.

Everything changed with the beginning of 'Perestroika' and 'Glasnost' (the officially announced publicity policy). As a result, the previously unknown pages of the past of the country and national republics became public. Almost every day, there were sensational publications of various authors published by popular magazines and newspapers, which also printed previously classified documents from historical archives.

Traditional historical researchers and academicians were in shock. It was not easy for historians to abandon the 70-year-old account of history tied to ideological dogmas; the crisis associated with the loss of orientation was overcome with great difficulty and mainly by young historians. In the late 1980s, foreign historians, who studied the history of Azerbaijan, began visiting the country. Until that time, their existence was known only to a narrow circle of historians, who worked with foreign literature in specialized repositories of local and central libraries.

For the first time, Azerbaijani historians left the USSR in 1990, when a conference was held at the University of London on the history of the South Caucasus. The event was attended by historians from Azerbaijan, Armenia, and Georgia, as well as the so-called Sovietologists - scientists from Great Britain, the USA, and France. It is symbolic that in the same year in Moscow the last all-Union conference on political history was held. The event was attended by scientists from the Soviet republics, which declared independence the following year.

Key words: *social sciences, perestroika, new historical sources, international conferences.*

Introduction

Scientific development in the USSR has come a long way and, despite all the obstacles posed during its formation and development, has reached a reasonably high level by the mid-1980s. The development could be witnessed mainly in the natural and technical sciences. The progress in these fields was considered to have strategic importance, because of the USSR's desire to keep the palm in space-race, nuclear physics, petrochemistry, and other sciences for the country's development. Thanks to the established contacts with the international experts and scientific centers in these fields, so-called 'hard science' representatives from the Soviet Union became winners of prestigious international awards, including the Nobel Prizes.

However, in the early 1990s, global surveys demonstrated a decrease in interest in the so-called 'hard science' and its achievements, in comparison to the heyday of scientific and technological progress in the 1950-70s. In the Soviet Union, this process accelerated during the years of Gorbachev's 'Perestroika' and reached its peak during the disbandment of the USSR in 1991.

In the 1970-80s in Azerbaijan, the state paid quite a lot of attention and established generous funding for scientific purposes. It was typical for all union republics. During these years, the number of all-union and international scientific conferences increased, which led to an increase in joint research project numbers and integration of scientific communities. Indeed, the capital cities - Moscow and Leningrad were leading venues in this respect, but to a certain extent, this extended to the national republics. In particular, in September 1982, the Soviet-American Symposium on Chemical Biological Aspects of the Impact of Pollutants on Marine Organisms was held in Baku, the capital of the Azerbaijan SSR. The event was organized by the USSR State Committee for Hydrometeorology and Environmental Control and Azerbaijan SSR Institute of Botany of

the Academy of Sciences. (*Protokoly TSK Kompartii Azerbaidzanskoj SSR*, Prot. N 12 §5, 07.04.1982.)

In August-September of the same year in Baku, the USSR State Committee on Science and Technology and the Azerbaijan SSR Council of Ministers organized training courses (workshops) for specialists from developing countries of Asia, Africa, and Latin America. The organization of the classes was entrusted to the Institute of Soil Science and Agrochemistry of the Academy of Sciences and the Ministry of Land Reclamation and Water Management of the USSR. (Prot. N 12 §7, 23.06.1982.)

At the same time, the Institute of Oriental Studies of the USSR Academy of Sciences organized a large international conference with the participation of Asian and African scientists. At the personal request of Yevgeny Primakov, then director of the institute, to Haydar Aliyev, then the first secretary of the Central Committee of the Azerbaijan SSR Communist Party, 90 participants of the conference visited Baku; scientific discussions continued, and the guests got acquainted with the historical monuments of Azerbaijan. (Prot. N12 § 8, 23.07.1982.)

An expanded meeting of the Philosophy and Law Department of the USSR Academy of Sciences dedicated to the 60th anniversary of the Academy was also held in Baku. The event also gathered scientists from all over the Soviet Union. (Prot. N 12 § 9, 21.09.1982.) This was considered to be an indicator of a high appreciation of the scientific school established in Azerbaijan by that time.

The state of historical science on the eve of the collapse of the USSR

Concerning historical science, the successes were mainly in the fields of studying ancient and medieval history. The interpretation of the new and recent past events was based on the dominance of Marxist-Leninist ideology, and the corresponding analysis of historical events significantly impeded the process of national science reaching the world level. Until the mid-1990s, political history, as a separate area of history science, practically did not exist. All political events of our new and recent history up to 1991 were considered in Russian historiography only as background material for congresses, conferences, and plenums of the RSDLP, VKPB, and the CPSU. The subjects such as “History of the CPSU” and “History of the Communist Party of Azerbaijan” basically monopolized the political themes, reducing the multifaceted nature of political science into the apologetics of the history of one political institu-

tion – the Communist Party. The same stands true for all the humanities and social sciences. As a result, vast strata of humanitarian knowledge either completely fell out of the Soviet system of education and science, or were presented in a dosed and exclusively critical manner, as “bourgeois science.” Almost half of the world’s leading scientific journals, including publications such as ‘Science and Nature’, were removed from public access and collected into specialized library repositories. Only a limited number of scientists had access to these repositories, some of which used this opportunity to plagiarise foreign publications. (*Razval sovetskoi nauki*. <https://ruxpert.ru/> Accessed 12 April 2020.)

With the beginning of Perestroika, new tasks were set for Azerbaijani scientists. It was reflected in the resolution of the Central Committee of the Communist Party and the Council of Ministers of the Azerbaijan SSR of 7 May 1987 “On measures to improve the training and use of scientific and pedagogical personnel.” (ARPAISSA f.1, op.76, d.66, l.9.) The document noted the need to increase admission to graduate school, and all scientific institutions were ordered to submit their proposals to the Academy of Sciences and the Ministry of Education. In turn, the Academy of Sciences was instructed to intensify the work on preparing doctors of sciences and to take prospective young cadres under the age of 40 into doctoral studies. Besides, it was proposed to increase the scientific level of theses, strengthen the requirements for supervisors and opponents, as well as to ease the conditions of defense, and reduce the time for approval of dissertations. (Ibid.)

Closer to the 1990s, it has already become clear that a deep crisis, which could lead to irreversible changes, is beginning in the country. However, in April 1991, a few months before the collapse of the USSR, a decision on a new edition of the Azerbaijan Soviet Encyclopedia was made by a bureau of the Central Committee of the Communist Party of the Azerbaijan SSR (ARPAISSA f.1, op.86, d.39, l.3; Prot. N 12 §7.) The first edition, consisting of 10 volumes, was published in 1976-1987. The Academy of Sciences, the Ministry of Education, the Culture Fund, and other organizations were involved in preparing the new encyclopedia. Among the main requirements imposed on the compilers of the encyclopedia were objectivity, scientific approach, free from the conjuncture reflection in it of crucial issues of the social, cultural, scientific, and economic life of Azerbaijan. Particular attention was paid to the neutral coverage of critical points in the history of Azerbaijan, which were silent or falsified by Soviet historiography. The first volume of the encyclopedia was to be printed out in 1993, and before 2000 it was planned to pub-

lish 15 volumes. (Ibid.) However, the subsequent events that led to the collapse of the USSR, a protracted crisis in the economy, and political upheaval delayed the implementation of these plans for more than ten years. Only in 2004, the scientific center “Azerbaijan National Encyclopedia” was created, and from 2007 to 2015, 7 volumes of the National Encyclopedia were published. (*Azərbaydzhan Milli Ensiklopediasy*.<http://ensiklopediya.gov.az/>)

Similar events took place with the anniversary of the great Azerbaijani poet of the 12th century Nizami Ganjavi. In 1991, by the decision of the Central Committee of the Communist Party of the Azerbaijan SSR, a series of notable events were planned to celebrate the 850th anniversary of the poet, including international conferences and symposia. (AR-PAIİSSA f.1, op.85, d.1, l.3. Prot. N 154, §6.) The anniversary events also failed to take place because of the same reasons. The only significant event was the announcement of UNESCO 1991 as the Year of Nizami. (Arzumanlı 1997, 134) All these decisions supposed to enhance the role of science and culture in society, nonetheless the reality interrupted all good intentions and plans.

The beginning of changes in public life and science

With the start of ‘Glasnost’, the officially announced policy of transparency and publicity, the previously unknown pages of the historical past of the whole country and national republics became public. At the time, it was possible to read shocking articles of various publicists on the pages of popular magazines and newspapers every day. They also published previously classified documents from historical archives. Traditional historical science was in real shock. The abandonment of the 70-year-old historical tradition based on ideological dogmas was not easy for historians; the crisis associated with the loss of orientation was overcome with great difficulty and mainly thanks to young historians. The crisis continued even in the early 1990s when the Baku State University published a course of lectures titled “Political History of the 20th Century”, an attempt to present neutral interpretation of historical events in Russia and Azerbaijan from the beginning of the 20th century up to the 1990s. Nonetheless, it was evident that the same traditional Marxist-Leninist ideological scheme prevented authors from reaching their goals and going beyond the ideology. (*XX əsrin siyasi tarixi* 1991)

Limited progress was made in the early 1990s in studying the history of the Azerbaijan Democratic Republic of 1918-1920 – the topic banned during Soviet times. Most of the books written at that time were

for the general public, aimed at a broad audience of readers and providing an interpretation of the history of the time with recent events. This approach affected the depth of the research works. (Näsibzadə 1990; Balaev 1990; İagublu 1991)

Only in the second half of the 1990s, historians began more in-depth research of the political processes of 1917-1920. (Hasanov 1993; Agamalieva, Khudiev 1994; *Azerbaïdzhanskaia Demokraticheskaia Respublika (1918-1920)* 1998) From 1975 to 1990, symposia and conferences on political history and the history of political parties existing before the revolution in the Russian Empire were held in various cities of the USSR. Azerbaijani historians took an active part in them. As a result of the conferences, several scientific collections and monographs were published, and as the situation evolved, their titles changed from 'From the history of Bourgeois and Petite-bourgeois political parties' to 'History of Non-Proletarian Parties'. (*Bankrotstvo melkoburjuaznykh partiï Rossii (1917-1922)* 1977; *Neproletarskie partii Rossii d gody burjuazno-demokraticeskikh revoliutsii i v period nazrevaniia sotsialisticheskoi revoliutsii (Materialy konferentsii)*, 1982)

In the collective monography titled "Non-proletarian parties of Russia in three revolutions," published in 1989, a thorough analysis of the leading programmatic principles and conceptual understanding of the features of the formation of political parties in Russia and its outskirts were carried out. However, although the general high academic level of the group of researchers, this work also was not free from ideological dogmatism. As an example, the Mensheviks and all neo-populist (*narodniceskiye*) parties were included in the list of "non-proletariat" parties, although their vision reflected the interests of the proletariat also. This shortcoming was also noted by Doctor of History V. V. Shelokhaev, one of the organizers of the next conference on political parties held in Moscow in 1990. Shelokhaev voiced out the tasks that historians should put forward during the time of fundamental changes in social and political life. According to him, first of all, these tasks were the development of a new classification of political parties taking into account the alternatives to the social construction of Russia at the beginning of the 20th century, and providing a rethinking of all their activities, free from propaganda, the problem of interconnections with national regions, and many others. In the speeches of the conference participants, the first attempts were made to reassess the established views on the political history of Russia and its colonies from objective positions. The author of this article, for the first time, presented at this conference an article about the Azerbaija-

ni political party ‘Gummet’. The paper reflected a new look at the activities and composition of this organization, designating it not as a “Bolshevik party”, as was customary in Soviet historiography, but as a “national-democratic party”. (*Personal archive of Baghirova*) Unfortunately, the conference proceedings were not published due to financial difficulties. This was the last all-Union conference, after 1991, communications between the former republics and academics were interrupted.

Beginning of relations with foreign countries

It should be noted that, along with the collapse of scientific connections within the USSR, relationships with other states began to be established. In the late 1980s, foreign historians, who studied the history of Azerbaijan, began visiting the country. Only a narrow circle of domestic researchers on history, who worked with international literature in specialized repositories of local and central libraries, knew about their existence. In Soviet historiography, it was customary to call these scientists studying the history of Russia and other USSR republics as “sovietologists.”

In 1989, famous American historian of Polish origin Tadeusz Swietochowski, whose book “Russian Azerbaijan 1905-1920” became quite popular in the historical community of Azerbaijan in these years, (Swetochovsky 1985) visited Baku. During the visit, he held meetings at the Institute of Archeology and Ethnography with Azerbaijani historians of the Academy of Sciences and Baku State University, where an interesting discussion took place on the issues of pre-revolutionary and Soviet history of Azerbaijan. (*Elm*, 25 May 1989)

Later, in the early 1990s, the so-called sovietologists Michael Rivkin and Audrey Altstadt, specializing in the history of Azerbaijan, came to Baku. During their speeches at the Academy of Sciences, they demonstrated a completely new look and analysis of the public events of the past and their interpretation in foreign historiography. For example, for the first time, Mikhael Rivkin, in his lecture, focused on the ethnic composition of the government and public agencies in the Soviet republics. He analyzed a particular pattern in the Communist Party personnel policy, which significantly changed after Stalin. The party human resources policy strictly adhered to the principle of not allowing ethnically local personnel to the highest positions in the center and monitoring the activities of public agencies in the national republics, appointing representatives from Moscow, mainly ethnic Russians, as deputy-secretaries. (*Personal archive of I. Baghirova*)

These statements led to debates among several Azerbaijani historians, which reasoned such policy with the principles of 'proletarian internationalism' and did not agree with the scientific division of party personnel based on their ethnicity. However, later this issue began to be studied in local historiography, and currently, there are several studies on the subject. (Khalilov 2015; Niftaliev 2017)

Audrey Altstadt had an internship at the Baku State University back in Soviet times, so unlike many "sovietologists", she had the opportunity to work with local archives and libraries. As a result of research, she published a book titled 'Azerbaijani Turks. Power and Identity under the Russian rule'. It is a very self-describing title about the problems the author covered in her academic work. (Altstadt 1992) During her visit to Azerbaijan after a long break, Altstadt presented to her Azerbaijani colleagues, including the author of this article, her book's main provisions. The chronological framework of the book covered the period from antiquity to Gorbachev's Perestroika and 'Bloody January' in 1990 when Soviet tanks entered Baku killing 137 civilians and destroying the last faith in Soviet power among the local population. (*Chernyi' ianvar' v Baku – 1990: Dokumenty i materialy*. 1990, 197)

At that time, secret archives began to open in Azerbaijan. Many historians, hungry for new discoveries, began to research previously inaccessible materials, a large number of different articles and books. Many of the published works in the early 1990s did not withstand severe criticism. They lacked scientific credibility and depth, but later, the problem found its solution, and the quantity gradually began to turn into quality. Many topics discussed with foreign historians subsequently became the subject of more in-depth research projects. In particular, the so-called 'ethnic question', relations between society and power, the formation of a totalitarian state, repression in the 1930s and subsequent years, depriving Azerbaijan of the independent thinkers and scientific elite, the years of Perestroika in Azerbaijan, accompanied by an exacerbation of ethnic clashes and, finally, the instability that accompanied the former Soviet republics during the years of the collapse of the USSR and gaining national independence.

Azerbaijani historians also began to travel abroad. In 1990, the first conference on the South Caucasus history was held at the University of London, attended by historians of Azerbaijan, Armenia, and Georgia, as well as the so-called sovietologists - scientists from Great Britain, the USA, and France. At the conference, scientists representing the Institute of History of the Academy of Sciences established contacts with the re-

searchers who were heard only by the names of their works and who were the subject of constant criticism of Soviet historiography. Among the names were Swietochowski, Ronald Suny, Mary Broxap, and many others. Among the participants from the South Caucasus (then Transcaucasia), there were well-known Azerbaijani historians - Marat Ibragimov, Arif Abbasov, Nigar Agamalieva, Irada Baghirova. Georgian scientific community was represented by the famous philosopher Merab Mamardashvili, historian Tamara Dragadze, and many others. The Armenian delegation of historians was Sergey Arutyunov, Aleksandr Khurshudyan, Konstantin Khudaverdyan, and others. (Personal archive of Baghirova)

Since the beginning, it was agreed that interethnic conflicts that flared up at the time would not be a topic of discussion. During the conference, the new challenges facing historical science in the context of a democratizing society, declassifying previously inaccessible archival materials and revision of many previously unshakable dogmas of national history were among the main topics which were discussed. Participants' speeches sounded many new ideas and views on both popular and first-mentioned topics: the Soviet occupation of the Transcaucasian republics, the fate of political emigrants, the Bolshevik revolution or coup, similarities and differences between the historical processes in the 20th century in the USSR and Europe. The speeches of the then Soviet scientists made a strong impression on the international conference participants. For the first time, they heard presentations free of ideological theses from the lips of representatives of the Soviet historical schools.

It is symbolic that, in the same year, in Moscow, the final all-Union Conference on Political History, was held. The conference was attended by scientists from the Soviet republics, which declared independence in the following year.

The collapse of the regime and its reflection on the state of science

It is noteworthy that the general state of science at that time was characterized not only by a break of scientific connections, but also by a sharp decrease in funding from the state budget, which was a real disaster for most scientific institutions and led to a systemic crisis in this area. From 1989 to 1991, the amount of funds allocated for social sciences and research projects decreased from 4.5 times to 10 times. (Kara-Murza. "Sostoianie i perspektivy reformirovaniia rossiïskoï nauki." *Nauchnyï ekspert*. 2013. N 5, 17)

Salaries in academic institutions and research institutes became inadequate, forcing the majority of scientists, especially young ones, to leave the science in favor of business activities, tutoring, or emigrating abroad. As a result, “age-related catastrophe” took place in science - by the year 2000, the generation of scientific workers aged 30 to 50 years had sharply decreased, even though the age of the most productive and effective work was 30-40 years. (Boiarintsev and Fionova. “*Voïna protiv razuma*”. - <http://bourabai.ru/boyarintsev/against09.htm>)

Work in science began to fall into the category of low-paid. In 1991–1998, predominantly, the salary of scientists was lower than the average national salary. In August 1992, researchers at the Russian Academy of Sciences was receiving 4 thousand rubles per month as salary (about \$ 20), and at the Academy of Sciences of Azerbaijan about \$ 25. (Kara-Murza, 19)

Following the lift of ban to travel abroad in 1989, emigration gained enormous proportions. In essence, from the late 1980s to the beginning of the 2000s, about 1 million people left USSR and post-Soviet countries for Israel. (*Razval sovetskoi nauki*. <https://ruxpert.ru/>) The same number of people emigrated to the USA and the Western European countries in the early 1990s. The main problem for all post-Soviet countries was a brain drain, as a result of which scientific schools developed in the Soviet era were beheaded. The American science historian L. Graham wrote, “according to the US Department of State, in 1990–1993, about ten thousand scientists and engineers from the former USSR countries emigrated to the USA... Thirty thousand scientists, according to the Bureau for Economic Cooperation and Development.” (*Voprosy istorii iestvoznaniya i tekhniki*. 1998, N 4, 3-17) In Azerbaijan, many scientists, teachers and especially musicians emigrated to Turkey, a country with a similar culture and language. It can be stated that Azerbaijani musicians played a considerable role in the development of modern classical Turkish music school.

Subsequently, in the 1990s, many humanitarian areas had to be re-discovered, and in many cases, learned from abroad. For example, creating modern institutes of sociology and ethnology, mastering the economic theories of the “capitalist world”, to open the pages of history that were previously closed for study. At the same time, from the point of view of descriptive and applied science, the situation in the humanitarian and social disciplines has dramatically improved since the collapse of the USSR. The collection of economic statistics and sociological data has been modernized and expanded, many historical sources have been pub-

lished, and the opportunity has appeared to deliberately and freely discuss many historical and social phenomena. Despite the inadequate funding, it was during this period that studies began to appear that shed light on the white spots of history, there was also a general trend in the subject of historical research of the post-Soviet republics. In particular, the topic of the Great Terror of the 1930s, accompanied by mass repressions against all sectors of society and especially the scientific intelligentsia, became the subject of study by both Russian historians and scientists of national republics. Indeed, at that time, not everyone had access to the secret funds and archives of the KGB. Nevertheless, those who had it have greatly benefited out of it. One of the first such researchers in Azerbaijan was Ziya Bunyadov, the famous orientalist, historian, academician, and hero of the Soviet Union. Even in the Soviet times, thanks to his official position, he could work in the KGB archives, and after gaining independence, based on the collected materials, he published a book titled "Red Terror". (Bunyadov 1993) In it, he first published documents about the terrible repressions that befell both political opponents of the Bolsheviks and ordinary people who were shot or sent to Soviet camps on false accusations. Following his murder in 1997, these studies were continued by many Azerbaijani historians, and new facts from the tragic past were revealed.

With the collapse of the USSR and the decline of the prestige of science, part of the scientific community began hoping for help from foreign funds, which started to award scientists with grants or even just provide a little financial assistance. However, this mostly affected Russian scholars, especially historians. Many historians and teachers received awards from the funds of Soros, McCarthur, Humbolt, Rockefeller, with the help of which the scientific literature began to appear in the mid-1990s. (Soyfer 2005) Unfortunately, in Azerbaijan, there was no such support, only a few scientists in the field of natural sciences received help in the form of short-term scholarships. Besides, the Soros Foundation, the Eurasian Foundation, and the Ebert Foundation, which started their activities in the republic, provided grants mainly to civil society representatives. (Baghirova "Open society in the South Caucasus – Illusions vs. Reality". *Central Asia and the Caucasus*, 2005, Vol. 1 (31), 7-14) An exception was made only once in 2004 when the Open Society Foundation (Soros) allocated a small grant for transliteration into the Latin alphabet of the 7-volume history of Azerbaijan, published in 1999-2002 by the ANAS Institute of History. (Ibid, 9) In the early 1990s, social sciences did not receive any material support. They survived only

thanks to the dedication of both scientists and institute leaders to their work, many of them were forced to teach at several universities and schools, but they did not leave scientific activities.

Conclusion

With the disbandment of the USSR in 1991, the single scientific community of the Union republics collapsed. At the same time, an unprecedented crisis in the economy, which had an extremely negative impact on the development of science, was combined with democratic transformations in society. Previously ideological social sciences found a new breath. In the process of Azerbaijani scientific community integration into the world community of scientists, their participation in international conferences and getting familiar with the works of foreign colleagues started to take place. Thanks to the access to the previously closed archives, research projects based on the new archive materials, studies on historical anthropology, on the history of culture and national identity, on repressions of the Soviet regime in Azerbaijan, started to take place.

Nevertheless, the general state of science in Azerbaijan and throughout the post-Soviet area was unsatisfactory in the late 1980s and early 1990s. A significant problem was the “brain drain” - external and internal emigration of promising scientists. We define ‘internal emigration’ as the professional researchers leaving their profession and science for a more well-paid job. In the paper titled “Intellectual Migration in Russia”, a qualitative analysis of external and internal migration, which is characteristic of all post-Soviet republics, was carried out. It was found that internal migration was well-spread among the researchers under 30 years old, leaving for business, public policy and other fields. Also, the external migration was well-spread among the researcher aged 30–45, representatives of the community with substantial scientific experience. It was concluded that quantitatively internal migration is much larger, but qualitatively lower. (*Intellektual'naiia migratsiia v Rossii* 1993, 65)

The researchers on Fundamental sciences also faced significant challenges since the financing of this direction was sharply reduced, too. Financing from foreign funds was just beginning, and preference was given to the natural sciences. Only in the second half of the 1990s, as the economic situation improved, financial support for scientific institutions was resumed, and in 2009 the Science Support Fund under the President of the Republic of Azerbaijan was established. (*Azərbaycan Respublikasy*

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The Process of Westernization of the Balkans after WWII: The Cases of Greece and Bulgaria

Abstract: *The high significance of the Balkan geopolitical knot was clearly expressed in the bipolar era when the main frontier between the two warring blocks passed through the Balkans. Due to the secret 'Percentages Agreement' between Great Britain and the USSR in 1944, the Balkans were divided into spheres of influence of the two great powers. Subsequently, London ceded the role of the main source of Western influence in the region to Washington.*

Of particular interest are the cases of Greece and Bulgaria as border countries that found themselves in different 'worlds' and, given the geostrategic importance of their territories, which were the main ideological instruments and conductors of ideas in the Cold war of the hegemons that stood behind. The Truman Doctrine in 1947 and NATO membership in 1952 strengthened and institutionalized Western influence in Greece. Westernization of Greek society in the form of liberalization and democratization of social relations and consequently its political system proceeded rapidly with a relatively short interval of the military dictatorship.

Greece was assigned the role of a model for the rapid and successful development of a western country, a bridgehead for the dissemination of anti-communist ideas in other countries of the Balkan region, primarily Bulgaria. Besides, due to the establishment of a strict pro-Soviet regime in Sofia, the westernization of Bulgarian society was carried out including through intelligence agencies, and after a certain thaw in relations through economic cooperation.

Key words: *The Balkans, Geopolitics, Westernization, Greece, Bulgaria, the Cold War, the 'Percentages Agreement'.*

I. The Balkan Geopolitical Knot

The Balkans – the cradle of European civilization, from ancient times, were an object of expansion of warlike ancient tribes, powerful kingdoms and empires and, finally, leading actors in international relations of modern and contemporary history. A favourable climate and fertile soil, on the one hand, the border position between Europe and Asia, as well as the Black Sea straits, on the other hand, predetermined the high importance of the territory of the Balkan region for international relations at all times. It is important to note that with the evolution of foreign policy as a professional phenomenon, the emergence and development of elements of geostrategic ideas, the expansion and rising of entanglement of international relations, the significance of the Balkans only increased. It was in the Balkans where Constantine the Great built a new capital of the mighty Roman Empire, it was with the conquest of Constantinople that the Ottomans created a great power, and it was the Balkans that were the main goal of the expansion of the Russian Empire over the 18–19 centuries. Important historical facts that were caused by the geostrategic uniqueness of the Balkan region could be listed quite a long, however, the mentioned events are enough to assess how significant the role of the Balkans was and remains in the global geopolitical space.

All this has formed an extraordinary cultural polymorphism of the Balkans, which is its undoubted advantage and a visiting card, but at the same time a great challenge to the development of interethnic relations within the region. Moreover, due to their centuries–old subordinate position due to expansion of great powers, protracted bloody wars on their territory, the Balkan peoples for a long time were deprived of the possibility of original national and civilizational development, which led to the tragic events of the redistribution of the territory during the formation of the new Balkan states. ‘The powder keg of Europe’, ‘Balkanization’ – these derogatory concepts are firmly included in the vocabulary of classical geopolitical science. Svolopoulos (1999, 22–23) pointed out that “indeed, in no other region of the globe did centrifugal tendencies develop in such intensity or variety”. The geostrategic attractiveness of the Balkan region, as well as its extremely high conflict potential, made young Balkan states highly dependent on foreign patronage, throughout the 20th century to the present day.

The Second World War was one of the main milestones in the history of mankind, leading to dramatic changes, perhaps in every area, including the field of international interaction, laying the foundation for a new system of international relations, often called the Yalta–Potsdam

system (named after Yalta and Potsdam conferences). The main feature of this system was the final transition from eurocentrism to globalism. That is to say decisions within the framework of world politics are no longer taken solely by European powers. Along with some European countries, the United States begins to play the main role in the new global world as a superpower, whose national interests extend to the whole world. Another feature of the Yalta–Potsdam system was the division of the world into two opposing poles of power – two blocks led by the USSR and the USA, and the main border between these blocks passed through the Balkans. Once again, as often happened in history, the interests of great powers clashed in this region.

However, it all began during the war. The USSR, Great Britain and the USA acted as allies, but it was obvious, perhaps to everyone, that this was nothing more than a situational alliance, a temporary partnership of the Russian communism with Western countries, which would inevitably collapse after the end of the war. It was also obvious that a new war between the former allies was impossible due to the mutual depletion of resources. Under these conditions, the main means of confrontation was ideology – an attempt to attract the maximum number of countries in their blocks, and as noted above, the Balkan states took the first and main blow of the ideological confrontation between the USSR and Western countries. Svolopoulos (1999, 22) remarked that “the struggle of the region’s peoples against fascism gave rise to a spirit of solidarity and hope, however, because of the climate that prevailed worldwide in the aftermath of the war, the Balkans went through another era of fragmentation that was tenser than ever before”. This article attempts to analyze the process of Westernization of the Balkan region after World War II on the example of Greece and Bulgaria – neighbouring countries that found themselves on opposite sides of the barricades during the Cold War era and became the main agents of ideological confrontation in the region.

II. Greece’s Case

Great Britain was the first among the countries of the Western world to be concerned about the future of the Balkan states after the end of World War II when the day after the British–American expeditionary forces landed in Normandy in mid–1944, British Foreign Minister Anthony Eden submitted to the military cabinet a draft post–war consolidation of the British Empire’s positions in Greece (along with Turkey) as a fundamental factor in the Balkan dimension of British diplomacy.

It should be mentioned here that at that time the British considered Greece to be the country of their traditional foreign policy influence. Since gaining independence owing to the revolution, Greece has been under the protectorate of Great Britain, Russia and France. Many influential politicians of the young Greek state were educated or had experience in the UK. Such were, for example, the Trikoupises (father and son), who played a colossal role in the political life of Greece in the 19th century. In 1917, historical Russia with its foreign policy traditions and aspirations, including the protectorate of the Orthodox peoples of the Balkans, was abolished. Two decades later, France was occupied by Nazi Germany. In consequence of these historical events, Great Britain turned out to be the sole foreign patron of Greece. London expectedly increased its influence on Athens. This is confirmed by the fact that after the occupation of Greece in 1941, the Greek government that fled to Cairo was under the strict control of the British.

But due to the victorious actions of the Red Army in Eastern Europe, it appeared in the Balkans a new important non-regional player in the person of the USSR, which inevitably led to a clash of interests with Great Britain. However, the general climate of the final period of the war favoured the development of diplomacy and the signing of mutually beneficial treaties between the Allies in the anti-Hitler coalition. At the Moscow Conference, which was held from October 9 to 19, 1944, Soviet and British leaders signed a secret agreement on the post-war distribution of influence in the Balkan countries, called the 'Percentages Agreement', thereby dividing the countries of the Balkan region into spheres of influence.¹ The initiative for such an agreement came from Winston Churchill, and Stalin supported but amended it.² In consequence of the 'Percentages Agreement', Greece after the war was to remain in the orbit of influence of Great Britain, and Bulgaria and Romania in the orbit of the USSR.³ However, these countries were supposed to fall into the sphere of influence not entirely, but in percentage terms, hence the name of the agreement. Despite the seeming irrationality of the mathematical separation of political influence, the agreement between Churchill and Stalin reflected 'with amazing accuracy' (with some reservations) the distribution of power in Central and Eastern Europe.

¹ Roberts, 2003.

² Parastatov, 2014, p. 42.

³ Roberts, 2003.

Graphically, the British–Soviet ‘Percentages Agreement’ of 1944 can be represented as follows:

Balkan country	The initial proposal by W. Churchill of October 9, 1944	The final distribution of the spheres of influence at the end of the conference	Changes to the original proposal
	USSR : Great Britain (%)	USSR : Great Britain (%)	USSR : Great Britain (%)
Romania	90 : 10	90 : 10	Without changes
Hungary	50 : 50	80 : 20	USSR +30 %
Bulgaria	75 : 25	80 : 20	USSR +5 %
Yugoslavia	50 : 50	50 : 50	Without changes
Greece	10 : 90	10 : 90	Without changes

As can be seen from the table, Churchill’s initial proposal was subsequently adjusted in favour of the Soviet side. The main goal of the British diplomacy in the Balkans was to keep Greece in its sphere of influence, as evidenced by the concessions of the British side regarding the initial proposal. The Soviet leadership also understood this, demanding more influence for Moscow in Bulgaria and Hungary. Thus, Churchill was able to achieve his goal of preserving in the near future British influence in Greece and, to a lesser extent, in Yugoslavia. Stalin made his conclusions, believing that his agreement with the British prime minister would give him *carte blanche* for any action in his sphere of influence.⁴

However, why did Stalin even make this agreement whereas by the end of the war the communists in Greece were the main political force? With the appropriate support of Moscow, Greece would become a country of the ‘Second World’. Apparently, Stalin did not believe that Mos-

⁴ Kovrig, 1973, p. 245

cow would be able to fully control the entire Balkan region and probably already at the end of 1944 saw in the charismatic and ambitious leader of Yugoslavia – Josip Broz Tito a competitor in the issue of leadership in the project of the Balkan Communist Federation. Also, the Greek Communists were mostly oriented towards Yugoslavia, receiving from them assistance from the civil war with the royalists. For instance, Swain (1992, 651) remarked that “it was in Greece, however, that this clash of interests between Stalin and Tito’s strategies was most clearly seen. In October 1943, when the Communist Party of Greece began the first round of the civil war, it sent a permanent representative to liaise with the Yugoslavs. Thereafter, until the summer of 1944, the KKE modelled itself closely on the Communist Party of Yugoslavia”.

Svolopoulos (1999, 23) pointed out that on the other hand, Stalin needed puppet governments in the new socialist countries of the Balkans, and he did not take risks, relying on the faithful Sovietization of Romania and Bulgaria. The subsequent split in relations between Stalin and Broz Tito helped Moscow achieve some important goals in the Balkans: Bulgaria became one of Tito’s most powerful critics and Moscow’s closest allies, and Yugoslavia ceased its aid to the Greek Communist guerrillas since as Svolopoulos (1999, 23) remarked: “no initiative aiming at establishing closer relationships between the regional powers could succeed if it did not accord with the wishes of the superpowers”.

Since 1947, the United Kingdom and the United States have been solidifying their efforts to assert their influence in the southern Balkans and to prevent Soviet influence from entering Greece and Turkey. This was connected with the presidency of Harry Truman, who, unlike Franklin Delano Roosevelt, saw in Soviet expansion in the Balkans a threat to US interests in the region in the form of a balance of power in favour of Moscow. Truman was extremely decisive, and his fiery speech in Congress on March 12, 1947, convinced the necessary number of American parliamentarians, and already in April 1947 the foreign policy doctrine on financial assistance to Greece and Turkey, named after the president, came into force.

The lack of foreign financial support for the Greek communists and the existence of such kind of sponsorship for the Greek royalists led the anti-communist movement to victory in the Civil War. The Communist Party was banned, and the process of gradual incorporation of social and political life into the Western model of development, in other words, Westernization, began in Greece. In addition to the Truman Doctrine, a number of factors contributed to the intensive nature of Westernization of

the Greek political system, and partly of the entire Greek society, including:

1. A monarchical regime that did not discredit itself by collaborating with the Nazis and was under British control for the entire period of exile.
2. The apprehension of eventual revanchist aggression from socialist Bulgaria. Greco–Bulgarian territorial disputes had by that time a rather long history, and the idea of national struggle, based on the prevention of the spread of ‘Bulgarophile rhetoric’ in Greek social and political discourse, played an important role among the Greeks.
3. Pro–Western strategic orientation of Greek intellectuals and businessmen, many of whom studied in Western educational institutions, conducted commercial activities with Western countries. It was during the interwar period, as well as the period immediately after the Second World War, the heyday of Greek commercial shipping, which revealed the talents of the world–famous magnates Stavros Livanos, Aristotle Onassis, Stavros Niarchos.

In the ‘struggle for Greece’, the Westerns won a great geopolitical victory. Soon in 1952, Greece and Turkey, economically underdeveloped countries, were admitted to the newly established anti–Soviet military alliance – North Atlantic Treaty Organization. This was done to strengthen Western influence in these states. According to the apt remark of the Greek historian Alexander Kitroeff (2011, 930) “Greece became a member and close ally to the United States whose presence in Greece was pervasive”.

Excessive cherishing of the right ideology in Greece failed in 1967 when the natural process of liberalization of Greek society was suspended by a coup d’état, owing to which the far–right dictatorship of the colonels was established in the country. However, the dictatorship failed to rule for a long time. The occasion for the abolition of the military junta in Greece was the crisis that arose following the Turkish military invasion of Cyprus and the occupation of its northern part in 1974, but the reasons for the overthrow of the Greek dictatorship ripened long before the events in Cyprus. Greek society, in particular its young generation, largely brought up on Western youth culture, in particular rock and psychedelic music, popular in the 1960s, was the locomotive of political opposition in the country.

Progressive music genres were banned, hence underground club scenes emerged, where many popular Greek musicians performed, the most prominent of which was Dionysis Savvopoulos, who has fused traditional Greek music with Zappaesque rock (Barret). It is symptomatic that the most famous Greek progressive rock band of that period, Aphrodite's Child, performed its compositions in English. Here is how one of the leaders of the dictatorship of the colonels Ioannis Ladas described the corrupting influence of Western liberal values, as well as popular culture on Greek society of that time: "The invasion of foreign ideas is unacceptable. Here I refer to psychedelic music and other similar tendencies, which instead of ennobling the passions and softening their character, as our forefathers have taught us, arouse the instincts and degrade human beings into sordid existences. As a result, this love for foreign music has overshadowed our folk music, which after all was not created by drug-addict hippies, but sprang from pure and authentic emotions".⁵

Meanwhile, the natural process of liberalization of Greek society was already implacable. Young people let their hair grow long (which was also forbidden for guys), listen to Western music coming into the country through the US military radio station Armed Forces Radio Service (AFRS) and other underground radio stations. In 1971, a Woodstock movie was shown in Athens, causing riots. For young people, this was one of the most exciting events of that period, and when the recently deceased Jimi Hendrix appeared on the screen, the radiance of a thousand lighters and candles filled the theatre (Barret). Eventually, the student uprising at the Athens Polytechnic University in November 1973, which led to the deaths of 24 students, played a decisive role in weakening the dictatorship, its strong discredit even in the eyes of the supporters. After those tragic events, the junta lasted less than a year.

Following the fall of the dictatorship and the restoration of democracy, Greece has taken the initiative in improving relations with its neighbours.⁶ Greece was the closest Western country to the still socialist Balkan states and was perceived as a conductor of Western liberal values in the region, which Athens willingly used. As Kofos (1980, p.194) pointed out "Greece's Balkan policy from 1974 to 1989 is a constant reminder of the country's role as a stabilizing factor in the region".

⁵ Ladas, I., 1970. Logoi. Athens.

⁶ Svolopoulos, 1999, p. 25.

In 1981, Greece joined the European Economic Community but did not fit to be in.⁷ It is unlikely that the negative consequences for the economy from such a step were not realized in Brussels. But this was done for the sake of the foreign policy agenda, in order to show the countries of the Eastern Bloc a successful model for the development of a country similar to them: with a predominantly agrarian type of economy, with popular ideas of socialism in society, etc. The world learned what this policy led to in 2008 when a deep economic crisis erupted in Greece. However, the foreign policy task was completed long before that.

III. Bulgaria's Case

With an emphasis on exerting influence on Greece, however, attempts were also being made to exert some influence on other states of the Balkan region, in particular Bulgaria. Right after the end of World War II, there was no consensus in the camp of the Western Allies regarding the separation of spheres of influence following the British–Soviet ‘Percentages Agreement’. Iatrides (1999, p. 270) noted that “at the Potsdam conference, President Truman declared that Bulgaria, Romania, and Hungary were not to be treated as belonging to the sphere of any particular power.” The Department of State refused to recognize the Bulgarian government as democratic and legitimate, but the United States recognized the Bulgarian communist regime in fall 1947, thus admitting total defeat on that particular diplomatic front.⁸ Washington’s relations with Sofia developed in an extremely intense way, even in comparison with US relations with other communist regimes in Eastern Europe. Not surprisingly, this relationship lasted a little over two years and was broken in February 1950 because of a diplomatic scandal over the Traicho Kostov case.⁹

Under these conditions, Western influence in Bulgaria was minimized and was possible only through some economic and cultural interaction, as well as intelligence operations with the aim of anti–communist propaganda. These niches were mainly represented by the UK and the USA. But, if London was focused on cultural and economic ties with Sofia, the United States, deprived of any official channel of influence, acted through its intelligence agencies.

⁷ Chincarini, 2012, p. 336.

⁸ Dunbabin, 1994, p. 435.

⁹ Curtis, 2017, p. 6.

On April 24, 1950, the US Department of State and the CIA approved the main political, psychological, and paramilitary program developed by the Political Coordination Department for Bulgaria, called QKSTAIR (later BGCONVOY).¹⁰ To undermine the power of the Communists in the country, it was planned to organize underground groups, establish a connection between them and American intelligence and prepare the situation for an anti-government uprising through propaganda, economic war and other actions.¹¹ Besides, Bulgaria was the object of the SYBILLE and ZRNAUNTLE programs aimed at interacting with Bulgarian emigrants to collect information and carry out underground activities.¹²

Emigrants from Eastern Europe, who poured in large numbers beyond the Iron Curtain from persecution by the Communists, became the objects of close attention of Western intelligence agencies. Several dozens of organizations were organized by Bulgarian emigrants, the most influential of which was the Bulgarian National Committee (BNC), created in 1948 in the USA by the famous Bulgarian politician Dr Georgi Mihov Dimitrov (alias Gemeto). The main goal of the BNC was the struggle for 'the liberation of Bulgaria from the communist and Bolshevik yoke' and 'the acquisition by the Bulgarian people of the right to a free and independent existence in tomorrow's free democratic world'.¹³ BNC was recognized and funded by the US Department of State.

The Bulgarian National Front (BNF) has declared similar goals. It was the second-largest emigrant organization, created in Munich in 1947–1948 by Professor Ivan Dochev (Kiryakov, 2011, 78–80). The BNF had a reputation as a nationalist organization, and in many respects from the words of Georgi M. Dimitrov, Dochev was described in American documents as 'a representative of extreme nationalism'.¹⁴ However, this did not prevent the American intelligence agencies from interacting with Dochev in anti-communist propaganda.¹⁵ The Washington Declaration of the Bulgarian National Front, adopted in 1963, proclaimed an

¹⁰ BGCONVOY_0001.

¹¹ Zboev, 2014, p. 38.

¹² Research Aid: Cryptonyms and Terms in Declassified CIA Files. Nazi War Crimes and Japanese Imperial Government Records Disclosure Acts.

¹³ Zboev, 2014, p. 38.

¹⁴ Ibid.

¹⁵ Ibid.

irreconcilable struggle to overthrow the dictatorship of the Communist Party of Bulgaria.¹⁶

Both organizations were of value to the CIA due to the preserved contacts within Bulgaria, the possibility of establishing contacts with members of the anti-communist underground and organizing the transfer of people both inland and out of the country. Also, by agreement with the leaders of the emigrant committees, intelligence agencies identified people for recruitment into NATO paramilitary units and sabotage groups.¹⁷

Emigrant leaders in the late 1940s and early 50s developed plans for an invasion of Bulgaria to raise and support an anti-government uprising. However, the practical value of the emigrant units was disputed by some American commanders, who considered them not reliable and not quite suitable on the battlefield. Thus, their function remained political and ideological. Before the disbandment in 1964, about 2,500 Bulgarian young men served in the volunteer company.¹⁸

The degree of interaction between the Western intelligence agencies and the so-called 'goryani movement', the anti-communist and anti-Soviet underground in Bulgaria, which operated in 1945–1955, remains little studied. Znepolski et al. (2018, 74) emphasize that "in the Transition years after 1989, the topic of goryani was loaded with emotional and moral charge and was used as an antidote against weighty (self-)accusations that Bulgaria was the only country in the former Eastern Bloc that had submissively accepted the Soviet regime that had been imposed on it".

The political orientation of the goryani movement made him a natural ally and addressee of American resistance support programs behind the Iron Curtain.¹⁹ Probably, the interaction of intelligence agencies with the goryani commanders was indirect and was carried out through foreign emigrant organizations.²⁰ One of the first brigades, the Kyustendil group, was created in the spring of 1945 under the leadership of Georgi M. Dimitrov and bore his name.²¹

One of the main areas of US subversive activity in the zone of Soviet influence was psychological warfare. Experts from intelligence agencies investigated the psychological characteristics of the population

¹⁶ Borba.

¹⁷ Zboev, 2014, p. 39.

¹⁸ Kiryakov, 2011, pp. 78–80.

¹⁹ Zboev, 2014, p. 39.

²⁰ Ibid.

²¹ Zhelev, 2006.

of the countries of the socialist camp, their history, mentality, and the availability of radio receivers, based on which conclusions were drawn about the prospects for the influence of American propaganda on them. So, in one of the analytical documents of the CIA, it was noted that traditional Russophile sentiments were widespread among the Bulgarians (although pro-American sympathies remained), however, the Soviet occupation and the policy of the Communists dealt a severe blow to them; even though the majority of the population seemed outwardly loyal to the ruling regime, only 15–20 per cent supported it sincerely.²² Under such circumstances, Western propaganda could count on some success. Its main channel should have been radio (on average, in Bulgaria there were 3 radio points per 100 people). The main mouthpieces of anti-communist propaganda in Bulgaria were Voice of America, Radio Free Europe, and the underground Radio Goryanin (from October 1953 – Voice of Resistance in Bulgaria, broadcast in 1951–1962), organized by Bulgarian emigrants.^{23,24} The aim of the psychological warfare was to proclaim the struggle against communist domination in Bulgaria and the return to its inhabitants of hope for liberation in order to encourage them to at least passively resist ‘communist slavery’ instead of accepting it without a will.²⁵

The restoration of diplomatic relations between the USA and Bulgaria in 1959 gave a new impetus for the developing of official channels of American influence on Bulgaria. In 1966, President Lyndon Johnson supported an East–West Trade Relations Act and authorized the Export–Import Bank to guarantee commercial credits to several Eastern European states, including Bulgaria.²⁶ In May 1968, while administration officials sought to persuade Congress that closer economic ties with the West would “weaken the overall control, the monolithic control, of the Communist Party over all phases of national life” in the Soviet satellites.²⁷ Of course, despite all these factors, the degree of Western influence (represented primarily by the USA) on Bulgarian society was significantly less than in neighbouring Greece due to obvious circumstances. Nevertheless, it had a certain effect, accelerated the process of natural liberalization of Bulgarian society and its subsequent westernization.

²² Psychological Warfare Intelligence Estimate, 1951.

²³ Znepolski, I. et al., 2018. Bulgaria under Communism. London.

²⁴ BGCONVOY_0006.

²⁵ BGCONVOY_0026.

²⁶ Kovrig, 1973, pp. 251–258.

²⁷ Kovrig, 1973, p. 283.

Today we know that the whole communist project per se was initially doomed to failure due to the utopianism of its ideas, separation from the reality of its basic tenets. But it was not obvious in that period. The soft power of Western states, coupled with broad economic preferences for neophytes, accelerated the pace of Westernization of the countries of the Eastern Bloc, introducing into their minds a model of successful development of Westerners as a counterweight to stagnation of the economies of socialist countries.

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The History of the Early Modern Period Turkish Armenians in Soviet Historiography

Abstract: *The study of the Early modern period Western Armenian or Turkish-Armenian history did not interest the Soviet-Armenian historiography much. It was primarily subordinated to the Eastern Armenian historical priorities, and occupied a marginal place in the Soviet-Armenian historiographical system. The absence of study on the Turkish-Armenian history in the Soviet-Armenian historiographical system was not an accidental omission, but the result of the political attitudes of the Soviet historiographical thought, which [the attitudes], since the Stalin era, had not always derived from the Western Armenian historical reasoning.*

Key words: *Armenian liberation idea, Soviet Armenian historiography, Leo, Ashot Hovhannisyán, Israel Ori, Marxist historiography, Orientalism.*

At the heart of the Soviet interpretation of the Early Armenian history is the Armenian national liberation idea. The Armenian liberation idea was formed by the ruling systems, and was implemented in the top-down direction. It is constrained in the chain of patterns of imperial-orientalism and nationalism. The Soviet totalitarian system prompted the introduction of an interpretation of the Armenian liberation idea, which was not subject to reversal. Since the tsarist period, the Armenian liberation idea had reproduced the self-interests of the Russian imperial policies and Eastern Armenian capital. Only in 1917, after the October Socialist Revolution, an attempt was made to criticize this interpretation of the liberation idea, which, however, was interrupted by the Stalin epoch. Returning to a number of realities of the tsarist period, Stalinism revived the tsarist interpretation of the Armenian liberation idea with new adapta-

tions. That interpretation is still dominant, with its legitimacy several times greater than other waves of resistance in the Armenian environment.

The question of the Soviet interpretation of the 16th-18th centuries Armenian history has not been studied yet. There have been separate attempts to write the history of the Soviet historiography, or to examine the historiographical views of individual historians, but these are mostly descriptive or propagandistic in nature. To this day, the Soviet-Armenian historiographical thought has not been substantively criticized, moreover, it has been reproduced, merely freeing itself from the apparent elements of Marxism, and unabashedly showing its liberal-nationalist essence. Due to the Soviet totalitarian heritage, the Armenian humanitarian thought has so far failed to overcome the predefined conceptions of the Early modern Armenian history, and to oppose a different perspective to them. State policy still regulates the formation of humanitarian thought, dictating its framework. This is the reason, perhaps, why the tsarist-Stalinist interpretation of the Armenian liberation idea has not been revised yet, when the political situation in Armenia is seriously dependent upon the Russian policy.

Political circumstances also underlie the study of the Turkish-Armenian history. Armenian studies strategies in Armenia, and the top-down policies in the humanities sphere greatly hinder and constrain the opportunities for the study of history, and reduce the range of the re-evaluation and rethinking of historical phenomena.

The question of the periodization of history

During the Soviet period the question of the periodization of the Armenian history was discussed three times, in 1925, 1947 and 1951. The last two discussions mainly concerned the question of existence of slavery in Armenia, and did not bring any substantial changes to the system of the periodization of history. In that respect, the first discussion was of key importance. Back in 1925, on the initiative of Ashot Hovhannisyan, Secretary of the Central Committee of the Communist Party of Armenia, a commission of historians (Leo, Davit Ananun, Tadeos Avdalbegyan and others) was set up, which held several sessions to work out the principles of the periodization of the history of the Armenian people. During those discussions T. Avdalbegyan suggested periodizing the Armenian history according to the requirements of Marxist theory, which was approved by the disputing parties, with the exception of Leo. The diverging approaches to the time of the periodization of the new pe-

riod of the Armenian history, which came to light as early as during this discussion, became characteristic of the further developments of the Soviet-Armenian historiography. In particular, Leo suggested considering the 16th-17th centuries as the starting point of the dating of the new period of the Armenian history, while the other participants in the discussion rejected that approach, considering the beginning of the 19th century as the start of the new history, “when the revival of Armenians was taking place under the economic and cultural influence and political intervention of Russia” (David Ananun). (Hovhannisyanyan, P. 1993. *Hay zhoghovrdi patmut'yan parberats'man himnharts'in nvirvats hamazhoghov. Lraber hasarakakan gitut'yunnneri*, 4, 157-158). Leo advocated the European approach to the dating of the new period in the periodization of history. He thought that, even though the political situation of Armenians in the Middle Ages was different from that of Western Europe, Armenians, as a Christian nation, had the same worldview and ideas that were prevalent in global Christianity in that period. (Leo 1969. *Erkeri zhoghovatsu. Hayots' patmut'yun*. Yerevan: “Hayastan” hrat., vol. 3, 11). According to Leo, despite the repeated wars, Iran and Ottoman Turkey, with their stable political and legal systems, had close trade relations with “New Age” Europe, which helped “the nations that live in those countries and possess remarkable merchant abilities to create movements in their internal life” (Leo 1969, 11). Thus, Armenian merchants imported not only goods, but also ideas from Europe, even acting as a secular “advanced intelligentsia”. Leo believed, that it was these contacts with Europe that created favorable conditions for the political activity of Armenians, when the colonies founded by merchants served the “motherland” (Leo 1969, 13-14). However, Leo’s above-mentioned approaches to the periodization of history did not continue into the tradition of the Soviet-Armenian historiography. The only exception, perhaps, is the Soviet-Armenian historian M. Zulalyan’s work *Arevmtyan Hayastanë XVI-XVIII dd.* (“Western Armenia in the XVI-XVIII centuries”) (Zulalyan, M. 1980. *Arevmtyan Hayastanë XVI-XVIII dd.* Yerevan: HSHS GA hrat.), which covers the chronological framework analogous to the periodization of the “New history” proposed by Leo, and which, at places, is structurally influenced by the latter.

Thus, the principles of the universal periodization of history were not accepted by the Soviet historiography. In the scheme of the periodization of the Soviet historiography, the Early modern period (1500-1800) is included in “the period of decline of feudalism (14-18th centuries)” (also known as “the period of stagnation of feudal relations and economic

decline” (Zhamkochyan, H., Abrahamyan, H. Melik'-Bakhshyan, S., Poghosyan, S. 1975. *Hay zhoghovrdi patmut'yun*. Yerevan: Erevani petakan hamalsarani hrat., 580). According to the Soviet-Armenian historiographical thought, this is explained by the fact that the period of feudalism, developed in the Armenian reality due to the foreign invasions and conquests, was not followed by the stage of the natural development typical of the Western European countries. The fact of recognizing the 14th-15th centuries as the starting point at the base of the periodization of history reveals the determined intent of the Soviet-Armenian historiography to highlight the decline of Armenian-Georgian feudal rule of the Zakaryans, and to contrast Zakaryans' Christian reign with the subsequently established Muslim rule, which the Armenian people were subjected to. Against the background of the disappearance of the feudal authorities, the church was promoted as a bulwark of “national power”, so, “for the consolidation of the masses, the strengthening of the ties between the homeland and the Armenians of the diaspora, and for the development of the social, political and cultural life”, a crucial importance was attributed to the transfer of the Catholicosate from Sis to Etchmiadzin in 1441, and to the activities of the Armenian Catholicoi there (*Hay zhoghovrdi patmut'yun* 1972. Yerevan: HSSH GA hrat., vol. 4, 7). Thus, the Soviet-Armenian historiographical thought shows open tendencies to cut the Armenian history out from the context of the world history, and to marginalize it in the frame of national history.

However, if the opinions of the experts were divided over the dating of the beginning of the new period, there was no controversy as to the establishment of its end date, and the start of the next period. According to the Soviet historiography, the “new or modern” period of the Armenian history began in the early 19th century, more specifically, in 1801, when Eastern Georgia, along with some northeastern regions of present-day Armenia, came under Russian rule. The Russian intervention in Transcaucasia is heralded as a great historical event in the life of the Armenian people. The Russian colonial policy is presented as the only “correct conclusion” of the Armenian liberation thought (Zulalyan 1980, 5), when Russia's commercial-economic and politico-military goals coincided with the interests of Armenians and other peoples of Transcaucasia (*Hay zhoghovrdi patmut'yun* 1972, 9).

Thus, at the core of the periodization of history the Soviet-Armenian historiographical thought placed the doctrine of socio-economic modes of production or formations, that is, the primitive communal society, slavery, feudalism, capitalism and socialism. According to

the Soviet-Armenian approach to the periodization of history, the feudal order lasted until the 19th century. The new century, which started in 1801, however, is not declared as an era of capitalism, but is called *new Armenian history*. This violates the formation theory, as with such dating the Soviet-Armenian historiographical thought sanctifies the beginning of the Russian expansionism in Transcaucasia, proclaiming it a new historical period, thereby deviating from the principles of the Marxist periodization.

The Armenian liberation idea in tsarist Russia

The lines of reconciliation between the expansionist policy of Russian tsarism and the Armenian liberation movements were drawn as early as in the period of tsarist rule. The first signs of the pro-Russian sentiments of Armenians were observed already in the 1720s, when some Eastern Armenian circles tried to rely on the Caspian invasion of Peter the Great, hoping thereby to protect themselves from the tribes that rebelled against Iran. Thus, starting from the 18th century, due to the unstable situation in Iran, the tentacles of the Armenian capital were directed to safer Russia. The Russian orientation became the general political attitude of the Armenian trading, landlord, melik class. A commonness of self-interests formed between the Armenian capital and Russian expansionist policy, which required an ideological underpinning. The Russian-Armenian bourgeois intelligentsia undertook to perform this task, formulating the ideological defense of the interests of the emerging national bourgeoisie as an “enlightenment project”, which fit perfectly into the political agenda of tsarist Russia, deriving from the context of the Russian foreign self-interests, colonial expansion and expansionist policy. Khachatur Abovyan, a writer and educator, is the unequivocally proclaimed father of the Armenian enlightenment. Abovyan’s school and literature formulate the notion of a nation which serves the interests of the bourgeois class. His open tsarism and russophilia are directly connected with the interests of the Russian-Armenian capital, and illuminate the path of the latter. Abovyan's novel *Verk' Hayastani* (“Wounds of Armenia”), written in 1841, sanctifies the Russian expansionist policy regarding Iran, and glorifies the transition of Armenians from Persian rule to Russian rule, resulting from the Russo-Persian war of 1826-1828. “Blessed be the moment when the sacred foot of Russians stepped onto the land of Armenia, and the cursed and evil ghost of kizilbash was chased away from our country. For as long as there is breath in our lungs, day and night we must recall the sufferings we have been through, and

whenever we meet Russians, we must cross our faces, praise the Lord as he heard our prayers and brought us under the mighty, god-blessed hand of the Russian king.” (Abovyan, Kh., Verk’ Hayastani): With Abovyan starts the political line of framing the Russian expansion as Armenian liberation, of exalting and consecrating Russian rule. “The word Russian must be sacred to us, and sacred must be the name of the one, with whose help we are forever liberated, sacred must also be his care, under which we live, perfectly protected from the enemies of our faith and homeland” (Hovhannisyanyan, A. 1933. *Abovyan 1804-1848*. Yerevan: Pethrat, 35).

Already in the middle of the 19th century the torch of the Armenian enlightenment passed to the editorial staff of the *Hyusisap’ayl* (“The Northern Light”) magazine, published in Moscow in 1858. Stepanos Nazaryants and Mikayel Nalbandyan were especially zealous in spreading the ideas of enlightenment. While studying with Khachatur Abovyan at the University of Dorpat, Nazaryants adhered to the national liberation sentiments and views typical of his time, and considered the annexation of Armenians to Russia a “stroke of fortune” (Hovhannisyanyan, A. 1966. XIX dari 50-60-akan t’vakanneri arevelahay hasarakakan-k’aghak’akan hosank’nerë. *Patma-banasirakan handes*, 1, 34). With all its internal positions in this period, from national liberalism to more radical democratic approaches, the bourgeois-democratic wing continued to direct the arrows of the national liberation struggle against Persian-Turkish imperialism as before, and view the Armenian existence under Russian rule. Neither S. Nazaryants nor M. Nalbandyan raised the issue of political liberation. The first supported the idea of national-cultural progress, while the second underlined the necessity for an economic revolution.

The new transformations of the Armenian liberation idea are connected with the Great Eastern crisis, emerged in 1875, and the Russian-Turkish war of 1877-1878. *Mshak* (“The Toiler”) newspaper, published in Tbilisi, became the new stronghold of the Russian-Armenian liberation thought. The years of the publication of *Mshak* (1872-1921, interrupted in 1885) coincided with the Eastern crisis, the liberation struggle of the subject peoples of the Ottoman Empire, and the internationalization procedures of the Armenian question. The newspaper spoke from the liberal-bourgeois position, had a pronounced Russian, or rather, tsarist orientation, and fervently defended the political line of bringing Western Armenians out from under Ottoman rule by means of the Armenian national liberation movements. Among the Armenian periodical press of the period, *Mshak* stood out with its strongest pro-Russian position on the Eastern Crisis, and from the outset spoke for the necessity of organizing the

liberation of Western Armenians, propagating the idea of salvation of Western Armenians and of an armed rebellion. *Mshak* extensively covered all the actors of the Eastern Crisis, and the war situation, presenting the Armenians in the Ottoman Empire as being in an oppressed, exploited and disastrous state (Ayyazyan, G. 2014. The Reflection of the Russo-Ottoman War of 1877–1878 in Armenia’s Periodical Press. *Balkanistic forum 2014. 1-2-3*,). The editor of the newspaper and a well-known publicist Grigor Artsruni, in his article “What should Armenians do now” (*Mshak*, 1878, 41), was convinced that “Europe begins to respect a nation only when the nation begins to shed its own blood and the blood of its enemy for national freedom” (Petrosyan, E. (1959). *Raffi*. Haypethrat, 213).

One of the active ideologues of *Mshak* was the famous 19th century Eastern Armenian historical novelist Raffi (Hakob Melik-Hakobyan). From the teenage years, Raffi was captured by the historical novel *Verk’ Hayastani* by Khachatur Abovyan, the forefather of the Eastern Armenian enlightenment, which he described as “the first eruption of the Armenian liberation wars” (Petrosyan 1959, 475). Later, Raffi became Khachatur Abovyan's most faithful successor, as the main idea of *Verk’ Hayastani* was the elimination of the Armenian political subordination to Persian rule, and the key idea of Raffi’s works was the political liberation of the Armenian people from the sultanate (Petrosyan 1959, 561). He breathed new life into Abovyanian nationalism, combining it with the elements of the ideology of liberalism.

Raffi’s worldview was also greatly influenced by Stepanos Nazaryants and *Hyusisap’ayl* magazine, published under his editorship (Petrosyan 1959, 11). Raffi considered Mikayel Nalbandyan, another active ideologue of the same magazine, an “adorable man” (Petrosyan 1959, 123), and dedicated to him his first large work, the novel *Salbi*, as well as his poem *Nver N-i hishatakin* (“A Gift in memory of N”) (Petrosyan 1959, 15).

In 1877-1878, Raffi’s creative life entered a new phase against the backdrop of the rise and internationalization of the Armenian question after the Russo-Turkish war. He undertook the task of making his historical fiction a platform for the Armenian national liberation struggle. It was during these years that his publicist articles and historical novels were published, which articulated the national liberation ideas. Raffi committed to extracting and modernizing various manifestations of the Armenian liberation movement from the historical past. He based his creative approach on the historical truth rather than historical fact. And the histor-

ical truth of the Armenian people, according to Raffi, was Russian domination, which would guarantee the security of the physical existence and economic development of Armenians (Petrosyan 1959, 235). Raffi's historical novels and novelettes—*Khent'* ("The Fool") (1881), *Khamsayi melik'ut'yunner* ("The Khamsa Melikdoms") (1882), *Davit' Bek* (1882), *Kaytser* ("Sparks") (vols. 1-2, 1883-1887), *Paruyr Haykazzn* (1884), *Samvel* (1886)—served this political truth. Thematically, they primarily brought into literature the Russo-Turkish war of 1877-1878, and constructed around it the Armenian people's aspirations to liberate themselves from Ottoman rule. Several other loopholes of history, which adhered to the liberation program of 1877-1878 and legitimized the latter, received an artistic solution through Raffi's pen, and, though not being directly connected with the Armenian sentiments caused by the Great Eastern crisis in the last quarter of the 19th century, created a rich contextual background for them. Within the framework of this political program, Raffi brought into literature the history of the resistance movements, started in Syunik in the early 18th century, the chronology of the Armenian melikdoms of Karabakh, the anti-Persian sentiments, that began in the Armenian kingdom of Arshakuni in the middle of the 4th century, and created a historical contrast between patriotism and cosmopolitanism, unconditionally favoring the former. Raffi painted a grim picture of the life of the Armenians in the Muslim East. According to him, the only way to awaken the Armenian people from their slumber was enlightenment, i.e. the establishment of the European ways of life, preferring the European bourgeoisie to the Asian bourgeoisie.

The political and program line of Raffi's historical fiction found its expression in the historiography of Leo (Arakel Babakhanyan), his fellow writer from *Mshak*. On the occasion of the publication of the first chapter of Raffi's *Khent'* in the 26th issue of *Mshak* in 1880, Leo wrote: "We were fascinated, no, to be more precise, we were enchanted. How many-many times did I read it, six or seven, and still I was not satisfied. The minute the book came out of the printing house, it melted, was sold out in a couple of weeks. It was an unusual book in Armenian. No book had ever had such a large scale and such a profoundly enticing effect on the Armenian mind. ... It must be admitted that the key feature of Raffi's talent was that he understood the sentiments of the day, reproduced them in artistic images, with the help of which he exposed not only the types, but also the entire programs to the public mind" (Petrosyan 1959, 43-44). As a matter of fact, Raffi's literary map of liberation movements became a guideline for Leo, who was the first to introduce the idea of liberation

in the Armenian historiographical system. Leo saw the liberation movement as a great national movement which forged *New history*, and which, “through political liberation, seeks to create from medieval Armenians a New Age nation, with its own interests, its right to self-determination, its cultural peculiarities, its own homeland” (Leo 1969, 14). Leo was not a member of any political party, but with his political views he expressed the position of *Mshak*, and adhered to Armenian bourgeois liberalism. Following the attitudes of the Russian-Armenian liberal-bourgeois current, Leo too considered that the haven of the progressive intelligentsia of the Armenian enlightenment was the communication with the European civilization, and Russian rule was to be relied on for that. “Russian weapons not only brought peace and tranquility,” Leo wrote, “but also bridged the gap between our country, which had seen so much misery, and the European civilization. The peoples which had come under Russian rule could no longer have any other worries but the intellectual and cultural progress” (Sarukhanyan, N., *Hayots’ patmut’yan erakhtavorë*). The Russian orientation and subordination of Armenians found in the works of Leo—*Haykakan tpagrut’yun* (“The Armenian Printing”) (2 vols., 1901-1902), *Catholicos Hovsep Arghut’yan* (1902), *Step’anos Nazaryants’* (2 vols., 1902), *Grigor Artsruni* (3 vols., 1902-1905), *Hayots’ harts’* (“The Armenian Question”) (1906)—received a high political estimation in the tsarist period. In the pre-revolutionary period, Leo’s historiographical views were idealistic: in historical developments he favored such dispositions as the development of the “spiritual factor”, the overestimation of the role of an individual, the overvaluation of religion, the prioritization of the geographical environment. From the position of these political orientations and theoretical approaches, in the late 1890s, Leo conceived “the idea of writing a voluminous, unprecedented Armenian history” (Leo (1984). *Erkeri zhoghovatsu*. Yerevan: “Hayastan” hrat., vol. 4, 7). The first volume was published in 1917 in Tbilisi, and covered the Armenian history from ancient times to the 5th century. Already in 1927 three more volumes were ready: the Armenian history in the 5th-9th and 16th-19th centuries. “The Armenian History” of Leo is the first comprehensive history of the Armenian people, written outside the monastic environment. His historiographical legacy of the pre-revolutionary period reflects the political attitudes that found their way into the 19th-century Russian-Armenian bourgeois-democratic literature and publicism. The interests of the Russian-Armenian capitalism, mixed with elements of the tsarist expansionist policy, found ideological reflection first in the new Armenian literature, and then in publicist pages. The

new bourgeois-democratic literary and publicist tendencies, and the new political priorities, in their turn, carried into the historiography the mentality which pursued service to the interests of the national bourgeoisie, and was called to derive the interpretation of the Armenian history from the political and social attitudes of that new growing social class.

The upheavals of the Soviet historiographical thought and the Armenian liberation idea

In 1917, the February bourgeois-democratic revolution, and later, the Great October socialist revolution, overthrew the tsarist regime in Russia. On November 29, 1920, the Military Revolutionary Committee of Armenia entered Ijevan from Azerbaijan, and declared Armenia a Soviet republic. On December 2, the Armenian Soviet Socialist Republic was established by an agreement signed between the Armenian Federative (Dashnak) Republic and the Soviet Federative Socialist Republic of Russia (RSFSR). The former exploiting classes were deprived of political rights, especially the right to hold political office. As part of the international socialist revolution, and being called to end the capitalist order and eliminate all forms of exploitation of human labor, the power of Soviet Armenia, in the center and local communities, belonged to the soviets of workers', peasants' and red soldiers' deputies.

Under the existing circumstances, the humanitarian and public thought began to be built on the basis of the ideology of the new society. Marxist theory was put at the core of the Soviet historiography. The Soviet historiography of the 1920s was greatly influenced by Marxist historian and party figure Mikhail Pokrovsky's views, which derived from the ideas of historical materialism, class struggle, and internationalism. M. Pokrovsky and the followers of his school were fiercely critical of the traditional Russian and Western non-Marxist historiography.

The new revolutionary and political attitudes were also reflected in the Soviet-Armenian historico-philological critical thinking of the 1920s. There began the processes of the re-evaluation of the past and the study of the literary heritage with a new theoretical mindset. The humanitarian thought of the Russian-Armenian bourgeois-democratic period was criticized from the position of Marxist theory. The bourgeois-democratic interpretation of the Armenian national-liberation idea was recognized as military nationalism, nationalist romanticism (Petrosyan 1959, 507), which had become an obstacle for the international upbringing and friendship of peoples. From the point of view of the Soviet-Armenian critical thought of the 1920s, the enlightenment reformers of the Russian-

Armenian bourgeois-democratic current were advocates of the militant bourgeoisie, ideologues of the industrial capital, nationalist propagandists, inspirers of the chauvinist-Dashnak ideas, and forerunners of the Armenian fascism.

In the 1930s, however, there was a drastic change in the Soviet historiographical thought: the academic freedom, autonomy, and pluralism of opinions, existing in the framework of the proletarian dictatorship of the 1920s, were replaced by brutal control mechanisms in 1930s. In 1931 Joseph Stalin's letter to the editorial board of *The Proletarskaya Revolyutsiya* ("The Proletarian Revolution") newspaper was published, in which he harshly criticized the publication of Anatoly Slutsky's article "The Bolsheviks on the German Social Democracy in the Pre-War Period." He condemned Slutsky, as well as Trotsky's other students, for "turning an axiom into a problem" (Сталин, И. О некоторых вопросах истории большевизма: Письмо в редакцию журнала "Пролетарская Революция"). Stalin described the historians who derived the historiographical research from the archival documents as "hopeless bureaucrats, who can only rely on documents; archival rats" (Сталин, И. О некоторых вопросах истории большевизма: Письмо в редакцию журнала "Пролетарская Революция"). He believed that historiographical research should not be based on separate documents, but on the "deeds, history, actions" of the Bolsheviks (Сталин, И. О некоторых вопросах истории большевизма: Письмо в редакцию журнала "Пролетарская Революция").

In 1938, "The History of the All-Union Communist (Bolshevik) Party: Short Course" was already published, with Stalin taking active part in its compilation works. On November 14th of the same year, by a special decision, the "Short Course" was proclaimed as "a powerful new ideological weapon of Bolshevism, an encyclopedia of the basic ideas of Marxism-Leninism" (*О постановке партийной пропаганды в связи с выпуском "Краткого курса истории ВКП(б)"* 1944. Огиз: Госполитиздат, 1). From that point on, the party assumed the task of administering its history, "an administration, which presented the All-Union Communist (Bolshevik) Party's Central Committee's official, verified interpretation of Marxism-Leninism and the main issues of the history of the All-Union Communist (Bolshevik) Party, not allowing any other arbitrary interpretations. The publication of "Short Course" put an end to the arbitrariness and confusion, to the plenitude of different viewpoints, and the arbitrary interpretation of the key issues of the party's history and theory, that had found their way into the previously published

party history textbooks” (О постановке партийной пропаганды в связи с выпуском "Краткого курса истории ВКП(б)" 1944, 2). Pokrovsky's school, which had a leading position in historiography, was condemned for “perverting” the historical facts, for covering them contrary to historical materialism, from the present-day position and not in the context of the circumstances under which the historical events took place. Thus, “Short Course” put an end to the “vulgarization and debasement of Marxism-Leninism by restoring the regulations of Marxism-Leninism” (О постановке партийной пропаганды в связи с выпуском "Краткого курса истории ВКП(б)" 1944, 4). “Short course”, with Stalin's article “On Dialectical and Historical Materialism” (12 September, “Pravda” 1938) included in it, became an instrument of propaganda in the hands of the party, used for “eliminating the theoretical backwardness of the staff, and the problems of ideological training, and for bringing the propaganda work to the required high level” (О постановке партийной пропаганды в связи с выпуском "Краткого курса истории ВКП(б)" 1944, 5-6). It became a task to urgently centralize the administration of the party propaganda, which would do away with the prevailing “anti-Marxist vulgar confusion”, and would rectify the existing “wrong views”. The propaganda was to be carried out through printing, through “ideologically educating the Soviet intelligentsia in the spirit of Marxism-Leninism,” by making “Short Course” a compulsory component of the curricula of higher education institutions, and by studying in new optimized groups. “Short course” had a huge impact on the development of the Soviet historiographical thought —it legitimized and institutionalized Stalinism. Stalin was proclaimed as Lenin's only Marxist successor, and the “Short Course” turned the Soviet history into the party history, which was supposed to be a struggle against “opportunism” (Marckwick, R. D. (2001). *Rewriting history in Soviet Russia*. Palgrave Macmillan, 42). The “party” meant that the Communist Party was to be the sole arbiter of the historical truth, even a reference to the classics of Marxism outside the framework of the partisan interpretation was perceived as a violation, the Marxist conception of knowledge was replaced by the conception of the party, the state and the party were identified, the disloyalty towards the party was seen as disloyalty towards the state. (Marckwick 2001, 39).

During the Second World War, the modernist tendencies of the 1920s were criticized with a new fervor, being labeled as anti-scientific, anti-historical, vulgar-sociological and nihilistic. Already in the early 1940s, the bourgeois-democratic ideas of the tsarist period received a new political re-estimation. During the war, there was a need to inflame

the patriotic-nationalist sentiments of people, to instill a mood of defense against foreign invaders, and in order to realize it, the unique role of the bourgeois-democratic literature in establishing the idea of liberation struggle and patriotic pathos in society was emphasized. Stalin's political inclinations to identify with Peter the Great, and to revive the traditions of Russian chauvinism, became a good background for turning the Soviet-Armenian humanitarian and public thought around, and to once again look to the tsarist period Russian-Armenian bourgeois-democratic reform program. The idealistic, individualistic characters and patterns, produced by the Russian-Armenian bourgeois-democratic thought born in the tsarist period, were brought back, reprocessed and released to the public layers by the Stalinist propaganda machine.

The second wave of the appreciation and political revival of the liberal-nationalist Armenian literature started in 1953 with the death of Stalin and with the condemnation of the cult of personality. In December of 1953, the 8th plenum of the Central Committee of the Communist Party of Armenia unanimously condemned the "national-nihilistic mistakes" of the previous leadership in the field of literary heritage (Petrosyan 1959, 605). In that respect, of great significance was the speech of the Soviet figure Anastas Mikoyan at the meeting of voters of Yerevan Stalin constituency in 1954. "Of course, there are certain nationalist nuances in some of Raffi's and Patkanyan's works, but is it a reasonable ground to reject such cultural heritage, which reflected a number of pages of the Armenian people's heroic struggle against the Persian and Turkish oppressors, and which sang the peoples' life and labor with love and admiration? It is not by chance that Raffi dedicated his first work to Mikayel Nalbandyan, Chernyshevsky's comrade-in-arm" (Petrosyan 1959, 606).

Thus, from the 1930s onwards, the Soviet historiographical thought was subjected to strict regulations and control, leaving behind the academic autonomy and freedoms of the previous decade. The Marxist conception of history was replaced by the Stalinist conception, which described the historiographical approaches, formed in the Leninist period, as "anti-Marxist, vulgar-sociological", while "idealistic voluntarism" took the place of historical materialism. Thus, interrupting the formation of the Soviet modernism, Stalinism created a historiographical school under the banner of communism, which became the carrier of the ideas and the ardent implementer of the "national communism". The participation of the Soviet Union in the World War II gave new impetus to the awakening of the idealist historiography, and crushed the pillars of the Marxist conception of history for good. Due to the policy of inflaming

the patriotic pathos of the Soviet peoples and sending them to war, the idealistic characters and patterns of history were irrevocably resurrected. Under these circumstances, Leo's (pre-pokrovsky period) approaches, after certain reprocessing and adaptation to the Soviet-Armenian historiographical thought, were used as the base for the Soviet-Armenian interpretation of the early modern period of the Armenian history.

The liberation idea and the Soviet-Armenian historians (Leo, Ashot Hovhannisyan)

The center-dictated Soviet policies were clearly reflected in the ideological perceptions of the Soviet-Armenian historians. The trajectory of their changes shows that the humanitarian thought had the status of an instrument in the state bureaucratic system, and was dependent on the system of government. There were two key authors of the Soviet-Armenian interpretation of the Early modern period liberation idea – the historians Leo and Ashot Hovhannisyan.

In this paper, a reference has already been made to Leo's historiographical views, his bourgeois-democratic national liberal orientation, and his role as an active advocate of the Russian-Armenian industrial capital. After the establishment of the Soviet regime, when there started an active criticism of the ideological directions prevailing during the tsarist period, including the national bourgeois-democratic ideological front, Leo, unlike many of the fellow ideologues, was still alive, and was able to change his previous ideological orientations and adapt to the new situation. Despite his diverging political views, he cooperated with the authorities of the time after the establishment of Soviet rule in Armenia. Already in 1924, at the invitation of the government of Soviet Armenia, he moved from Tbilisi to Yerevan and worked as a history professor at the Yerevan State University (Nersisyan, M. 1966. Prof. Leoyi patmagitakan zharangut'yunë. *Erkeri zhoghovatsu*. Yerevan: "Hayastan" hrat., vol. 1, VI). Under Soviet rule, Leo, despite his old age, as characterized by the Soviet-Armenian historiography, spared no effort to reconsider "a number of his fallacies and mistakes; fallacies, which he later spoke openly and sincerely about" (Nersisyan 1966, VI); he tried to abandon his idealistic worldview and adhere to the materialist vision of history. In particular, he was influenced by the historiographical school of the Soviet historian M. Pokrovsky, and advocated the latter's views on trade capital (Nersisyan 1966, XIII). This in-memoriam note about his lecture best describes Leo's efforts to adapt to the new ideological situation in Soviet Armenia: "In 1926, the writer of my lines [Soviet-Armenian journalist,

literary critic Drastamat Simonyan – G.A.] had the honor of attending one of Leo’s lectures for the students of the History and Literature Department of the State University. The topic of the lecture was the great French Revolution. That lecture has become an unforgettable memory of mine. The 66-year-old lecturer, whose nearly 40 years of activity had been strongly influenced by the idealistic worldview, tried to explain, sincerely and with conviction, the events of the 18th century great drama of the French people in a materialist light” (Nersisyan 1966, XIII). In 1933, Leo’s efforts to learn the Marxist doctrine at his old age, and to fit under the Bolshevik ideological umbrella, were cut short: at the dawn of Stalinism, he died in Yerevan, and did not manage to historiographically legitimize the new falsifications dictated by the Soviet ideology. The subsequent generations of the Soviet-Armenian historians did that work for him. In the Soviet period, Leo’s aspirations to adhere to Pokrovsky’s vision of history were found by the Stalinist historiography to be “vulgar sociology and national nihilism”. It was considered that Leo “failed to properly comprehend the materialist-Marxist historical vision, and fell under the influence of Pokrovsky’s – who held wrong principles - historiographical school, i.e. historiographical direction” (Nersisyan 1966, XIII). Despite these “deviations” of Leo’s and his inconsistency in political orientations in the 1920s, his historiographical-literary legacy, created during the pre-revolutionary-tsarist period, was appreciated anew during the Soviet era, receiving a thoughtful regard. During 1967-1989 a collection of Leo’s works in ten volumes was published, a school and a street were named after him in Yerevan. The Soviet-Armenian revival of Leo’s liberal-bourgeois views was the expression of the policy of the Stalinist and post-Stalinist national communism. In the novelette “Mesrop” by the Soviet-Armenian writer Hrant Matevosyan, stableman Mesrop’s thoughts about Leo quite accurately describe the role assigned to the historian, which was to shape the patterns of the Armenian “identity” in the Soviet projects: “Armenians were invented by Leo. Before Leo, it is a lie, there were no Armenians. It was right in Leo’s time, when a mountain of a man was knocked down in front of my eyes, and no one said anything. There were no Armenians, were there, for anyone to speak up for them? - milk, sheep and whatnot. The starter was thrown in by Leo. How is yogurt made? They throw the yogurt starter in the milk, and it turns into yogurt. That’s how Leo invented Armenians. Take Hovhannes Tumanyan’s “The Dog and the Cat”, the cat was no craftsman, nor was the dog hatless; I mean, why would a dog need a hat? Hovhannes Tumanyan sat down and invented it for children. And so, they read it. And Leo, I guess,

sat at the other table and invented our history, the history of Armenians” (Matevosyan, H. 1978. *Mesrop. Tsarereĭ*. Yerevan: “Sovetakan grogh” hrat, 189-190).

Historian Ashot Hovhannisyan played an important role in shaping the main directions of the study of the Early modern period history in Soviet Armenia. Ashot Hovhannisyan was the first People’s Commissar of Enlightenment of Soviet Armenia, from 1922 to 1927 he was the Secretary General of the Central Committee of the Communist Party of Armenia. Hovhannisyan took an active part in the founding of the Yerevan State University, and the Soviet-Armenian school (Aghayan, Ts. 1972. *Haverzh hishatak ankhoj gitnakanin. Patma-banasirakan handes, 7*, 101). From 1954 until the end of his life in 1972, Ashot Hovhannisyan headed the Department of New History of the Institute of History of the Academy of Sciences of the Armenian SSR, and was a member of the editorial board of the multi-volume Armenian history to be published at the same institute. Hovhannisyan also played a remarkable role in the all-union activities of organizing the science: he was a head of a department at the Marxism-Leninism Institute under the Central Committee of the Communist Party of the Soviet Union, the director of the Moscow branch of the State Academy of the History of Material Culture, the deputy director of the Institute of History of the USSR Academy of Sciences (Ashot Garegini Hovhannisyan 1972. *Patma-banasirakan handes, 2*, 293). Ashot Hovhannisyan was, thus, one of the greatest representatives of the historiology of Soviet Armenia, and the trajectory of the alterations of his historiographical views and heritage best reflect the transformations of the Soviet policies.

Ashot Hovhannisyan’s historical vision traces its origins to his early adolescence and youth. In his autobiographical notes, he wrote that already in his high school years at the Shushi Diocesan School, he carried the ideological influence of the Western Armenian National Liberation Movement (Azatyan, V. (2016). “Och’ egits’i ch’eghealn, zor inch’ eghewn”. Ashot Hovhannisyan avartachař ev nra gortsun patmagitut’yunĕ. Ashot Hovhannisyan. *Israyel Orin ev hay azatagrakan gaghap’arĕ*. Yerevan: Ashot Hovhannisyan anvan humanitar hetazotut’yunneri institute, 573). In those years the Diocesan School of Shushi was greatly under the ideological umbrella of the Armenian Revolutionary Federation (ARF), with the young people coming out of it “influenced by the national culture”. And though in 1897 Hovhannisyan moved to the Shushi Real College, where the Marxist direction and the influence of the Communist Party were dominant, his bond with the ARF

remained unbreakable for several years: until 1903-1904 he continued to be a member of the ARF-influenced Caucasus Armenian Student Union (Azatyan 2016, 579-580). In 1904, Hovhannisyan joined the Armenian Social-Democratic Workers' Organization in Shushi, but this cannot be claimed to be a sharp transition from the ideology of the ARF. The Armenian Social-Democratic Workers' Organization was formed in October of 1903 on the initiative of the ARF member Alexander Tsaturyan (Roubeni) and a group of his fellow separatist party members. The separatist ARF members, while adhering to the national-political line of the party, tended to direct the ARF's resources towards organizing the Armenian workers within the labor movement. However, the majority of the party continued to attend to the "national cause", considering it more urgent than the situation of the Armenian workers (Azatyan 2016, 577). The Armenian Social-Democratic Workers' Organization also collaborated with the General Jewish Labor Bund of Lithuania, Poland and Russia, as well as the Austrian Marxists—the national autonomy advocates within the social-democratic movement (Azatyan 2016, 596). Later, on September 7, 1905, in a letter addressed to the Central Committee of the Social Democratic Workers' Party of Russia, V. Lenin called the Armenian Social-Democratic Workers' Organization a "Bund creatura, nothing more, specially invented to cultivate Caucasian Bundism" (Azatyan 2016, 597). The hostile sentiments towards the Armenian Social-Democratic Workers' Organization intensified especially starting from the second half of the 1920s, when its ideological opponents in the party criticized its demand to pay attention to the peculiarities of Armenia, calling its members "Specifics" (Azatyan 2016, 577). Ashot Hovhannisyan, who had long ago changed the camp from the Armenian Social-Democratic Workers' Organization over to the Social Democratic Workers' Party of Russia, did not escape criticism, and in 1924 was accused of nationalism for his past as a specific.

The other layer of Ashot Hovhannisyan's historical vision had been greatly affected by his teenage literary preferences. In his autobiography he wrote that from an early age he had been influenced by *Mshak* newspaper published in Tbilisi, especially by Leo, and had also been greatly impressed by Raffi's writings (Azatyan 2016, 572-573).

These influences on Hovhannisyan were still quite palpable, when in 1913, after studying in the Universities of Jena, Halle, and Munich in Germany in 1906-1913, he submitted his dissertation "Israel Ori and the Armenian Liberation Idea" for defense to earn a doctoral degree at the faculty of philosophy at the Ludwig-Maximilian University in Munich.

Hovhannisyan's dissertation was inspired by the passions aroused in the tsarist historiography over the article about Israel Ori "The Armenian Adventurer at the Kurpfalz Palace", published in 1893 by professor Karl T. von Heigel, and Heigel's advice to the young Armenian researcher A. Hovhannisyan to raise Ori's issue. However, the views of his teacher and advisor Heigel, did not have an effect on Hovhannisyan's dissertation: in 1955, on the occasion of the defense of his doctoral dissertation at the Institute of History of the Academy of Sciences of the Armenian SSR, he stated: "Contrary to our teacher [Heigel – G.A.], while [examining] the development process of Ori's negotiations, we defined him not as an adventurer or a leader representing the collective interests of all the Armenian people, but as a selfless figure, who directly represented and defended the aspirations and views of some groups of the Armenian meliks and merchants" (Hovhannisyan 2016, 485). On the other hand, the structure and main conclusions of Hovhannisyan's dissertation were substantially influenced by Leo's "Armenian Printing" (2 vols., 1901-1904), which Hovhannisyan, as he mentioned himself, liked a lot (Azatyan 2016, 608). Thus, Hovhannisyan's dissertation reflected the political and literary preferences of his teenage years, which had been fueled by the works of the ideologues of the national bourgeois-democratic liberalism. Coming to Russian Armenia, Hovhannisyan started working at the Gevorkian Theological Seminary in Etchmiadzin, and during 1914-1916 published articles in the religious, historical-philological and moral magazine "Ararat", the official periodical of the Mother See of Holy Etchmiadzin. Although Hovhannisyan formed a clandestine Marxist group while working at the seminary, the articles published in "Ararat" were not and could not be Marxist, taking into account the ideology of the Etchmiadzin Church, whose organ was "Ararat" magazine. During the years of being published in "Ararat", Hovhannisyan agreed with the centrifugal policy of the Mother See of Etchmiadzin (Hovhannisyan, A. 1915. Hakob D. Jughayets' i kat'oghikosē ev tachkahay nvirakut'yan khndirē. *Ararat*, 2-3, 195-205). In this period, he was mainly concerned about the problem of the Russian orientation of Armenians. Following the prevailing tendencies, he tried to give age-old legitimacy to the Armenian russophilia, preparing the moment when "the porphyry-bearer, marching from the north, enchants, as a new savior, the souls wandering in anguish" (Hovhannisyan, A. 1915. Hakob Jughayetsu mi grut'yunē rus ark'unik'in. *Ararat*, 9-10, 779, see also Hovhannisyan, A. 1916. Petros di Sargis Gilanents'. Patmakan kensagrakan aknark. *Ararat*, 1-2, 105-128). Thus, in the pre-revolutionary period, Hovhannisyan's historiological views were more in

line with the idealistic principles, he continued to reproduce the patterns of the Russian-Armenian bourgeois-democratic historiographical thought, to juxtapose the goals of the Armenian liberation idea with those of the tsarist colonial policy, to put the humanitarian thought at the service of the self-interests of the Armenian capitalist classes.

The Great October Socialist Revolution of 1917 and the modernist processes that had begun in the 1920s marked a watershed in Ashot Hovhannisyan's historiographical visions. His historiographical research papers of this period do not reflect the theoretical thinking that the historian had formerly held. In this period, Hovhannisyan openly supported Marxist perceptions of history, developing his ideas in historiography on the theoretical basis of historical materialism. Between 1937 and 1949, accused of nationalism, Hovhannisyan was repressed and sent to Kirovakan from 1949 until 1954, when he was finally acquitted. While in exile he wrote his voluminous monographs *Nalbandyaně ev ir zhamanakě* "Nalbandyan and His Time" (2 vol., Yerevan: Haypethrat, 1955, 1956) and *Drvagner hay azatagrakan mtk'i patmut'yan* "Episodes in the History of Armenian Liberation Thought" (2 vol., Yerevan: HSSR hrat., 1957, 1959) which were published in the middle of the 1950s. Although Hovhannisyan had refused to participate in the editing of "Short Course", nevertheless, his works from that period reproduce the approaches of Stalinist historiography, with no trace of the historiographical tendencies of the 1920s' modernist period. The Stalinist condemnation of the historiographical thought of the 1920s as "vulgar sociologism, national nihilism, anti-Marxism" was not reviewed during the Thaw period which had begun after Stalin's death. Moreover, in the years following 1953, in the light of the reassessment of the enlightenment project in Soviet Armenia, the ideological revival of nationalism, tsarist colonial policies and imperialist bourgeoisie was put on an institutional footing. Rehabilitated, Ashot Hovhannisyan set about furrowing the field of Soviet Armenian historiography in line with this political mentality. Besides the above-mentioned monographs, he wrote various articles, which analyzed the Russian-Armenian era of enlightenment and the Armenian liberation movements through the lens of the party's political agenda. To demonstrate Hovhannisyan's about-turn on his historiographical views, his evaluations of the same enlightenment figures, written from Soviet Modernist and (post) Stalinist historiographical standpoints, may be placed side by side. In the early 1930s, Hovhannisyan's opinion of enlightenment figures Abovyan and Raffi, was: "This transformation was even more striking in Raffi's literary works. An heir to Abovyan's *haiduk* ide-

ology, Raffi revealed Abovyan's *military nationalism*, adding the phraseology of *liberalism* to it." (Hovhannisyan 1933, 121).

"Abovyan's boarding house and school, his teaching methodology, and his literature were merely the ideological city of trade relations that encircled the city and were feudal in nature. Refracted in various societal-historical factors and layers of thought, his patriotism, his care for commoners and the poor, his love for the "people's" vernacular, "folk" motifs, "folk" themes were only the ideological manifestation of the aspiration to organize "the nation" and to build a domestic market for the national bourgeoisie based on feudal relationships." (Hovhannisyan 1933, 21)

From the 1950s onwards, the historian's views drastically differ from his political position of the preceding period. "We must not place Hugo's Romanticism and Balzac's Realism on an equal footing. Nevertheless, who can deny the role that the Romantic Hugo played in our awareness of the French social life and history of his time? The same can be said of Abovyan and Raffi. We should not forget Nalbandyan's testimony on the significance of *Verk'* (Wound). The same can be said of Raffi's *Kaytser*, while keeping in mind, for example, Aghayan's astute remarks in his well-known critique of the novel." (Hovhannisyan, A. (1959). *Nalbandyani ev Patkanyani gaghap'arakan hakamartut'yan harts'i shurj. Patma-banasirakan handes*, 4, 254): In the (post) Stalinist period, Ashot Hovhannisyan adheres to the political agenda of the so-called "balanced historiography" and renounces the principles of Marxist historiography prevailing in the 1920s.

Marxist perceptions of history were no longer of service to, and got in the way of, the political priorities of (post) Stalinist historiography. It became necessary to create mirages that would maintain an illusion of Marxism against the background of those perceptions being discarded and becoming a mere formality. The Soviet-Armenian humanities thought put this political ploy into effect most effectively through Mikayel Nalbandyan, the most "leftist" figure adhering to the Russian-Armenian enlightenment project and the idea of national liberation. It is well known that the Russian-Armenian enlightenment reformers held bourgeois-democratic views and, at best, professed national liberalism. In philosophy, they adhered to the principles of idealism. It is known that the generation of Russian-Armenian reformers was skeptical of both anti-tsarist currents in Russia and the bourgeois-democratic revolutions of 1840s in Europe. They were merely looking for possibilities of cultural autonomy in Tsarist Russia. As previously stated, one of the key follow-

ers of this line was Stepanos Nazaryants, the editor of Moscow-based *Hyusisap'ayl*. Both Nalbandyan and Nazaryants were *Hyusisap'ayl* correspondents, ideologically so close that, for political reasons, Nazaryants published Nalbandyan's article, *National Misery* under his name, with the latter's consent. (Hovhannisyanyan, A. 1950. Mik'ayel Nalbandyani norahayt pamfletë. (*HSSH GA*) *Teghekagir. hasarakakan gitut'yunner*, 7, 60): Nalbandyan came from Russian-Armenian national liberal circles. From 1859 to 1861, there was a certain shift in Nalbandyan's views, from idealism towards materialism. During his years as a student at the University of Moscow, he became familiarized with the new theories of natural science and evolution, and was influenced by A. Herzen's, N. Chernyshevsky's, N. Ogarev's, V. Belinsky's philosophical views and political activities. V. Lenin considered them to be the predecessors of Russian Social Democrats. This allowed Soviet-Armenian historiography to crown Nalbandyan as the most remarkable figure of the Russian-Armenian enlightenment generation, declaring him the predecessor of Armenian Social-Democrats (Hovhannisyanyan 1959, 272). Nalbandyan's position on liberation was acknowledged as "the most truthful and progressive path for the Armenian national movement" (Hovhannisyanyan 1959, 270), and his take on materialism came to be viewed as more acceptable and was differentiated from the heavily criticized "vulgar materialism" of the 1920s (Hovhannisyanyan 1950, 13). In Soviet historiography, Nalbandyan, together with his Russian mentors, has been called a Revolutionary Democrat. V. Lenin criticized Revolutionary Democracy as he believed that in the age of capitalism, it was impermissible to be a Revolutionary Democrat, frightened to progress towards Socialism. However, against the background of the reconsideration of tsarist period political mentalities during Stalinism, the relatively "left" Revolutionary Democrats, who stood up for the petite bourgeoisie and peasantry against the feudal, tsarist regimes and, at best, could pass for the predecessors of Social-Democrats, became a suitable tool to serve the purpose of regression from Marxism, Socialism and "vulgar materialism". Mikayel Nalbandyan, who was more moderate in his views than his Russian contemporaries and did not oppose the Russian rule, inadvertently became a tool for Pseudo-Marxist propaganda and a "rag" for the executioners of Marxism in Soviet Armenia to wipe their hands clean on.

The trajectory of changes in the historiographical views of Leo and Ashot Hovhannisyanyan, Soviet Armenian historians of the Armenian liberation thought of the 16-18th centuries, reflects the manifestations of Soviet politics in the field of humanities. Initially favoring the Russian-

Armenian liberal-bourgeois historiographical thought and reproducing the latter's patterns, Leo and Ashot Hovhannisyan joined the ranks of Marxist historiography in the wake of the October Socialist Revolution of 1917, renouncing their former idealistic perceptions of history and adopting materialist perceptions. The J. Stalin era and the Second World War drastically changed the tendencies of the perception of history prevalent in the revolutionary period. For political reasons, there was a return to bourgeois-nationalistic capitalistic patterns, which were adapted to the (post) Stalinist ideology. Under the new circumstances, Ashot Hovhannisyan set about resolving the new problems of historiography. He himself drew up the research framework and ideological course of the history of the "new and contemporary period". There was a great retreat from the perceptions of Marxist historiography. Pseudo-Marxist subterfuges were designed, and certain topics were put forward, in order to conceal the death of Marxism in the Soviet Union.

The Soviet-Armenian Interpretation of the Liberation Idea of the Early Modern Period

The foundations of the Soviet-Armenian perception of the Armenian liberation idea of 1500s-1800s, are buried in the folds of tsarist Russian-Armenian bourgeois-nationalist thought. K. von Heigel, a German researcher, published his article titled "Ueber den Plan des Kurfürsten Johann Wilhelm von der Pfalz, die armenische Königskrone zu gewinnen (1698-1705)" in 1893, during the period of the birth of the Armenian Question and the rolling boil of fermentation of the liberation idea. In this, he expressed doubts about the Armenian liberation project and its preacher, Israel Ori. As Heigel himself noted, his remarks profoundly offended Ori's compatriot Yezov who, in turn, wrote a voluminous book defending Ori's honor, in which he harshly ridiculed Heigel. Heigel did not take it as an insult as, owing to the fact that he did not speak the language, he remained unaware of the book's content. (Hovhannisyan 2016, 480) However, while the German professor managed to remain unconcerned about Yezov's book, it strongly impacted the Armenian historiographical thought. The book in question is a tome titled "Сношения Петра Великаго с армянским народом" (The Relations of Peter the Great with the Armenian People) written by Gerasim (Karapet) Yezov, a tsarist official and historian of Armenian descent, and published in 1898 by the Russian Imperial Academy of Sciences.

Heigel's observation is certainly slightly exaggerated and inaccurate but this book was not written merely as a response to him. It was

dedicated to the history of Russia's policies in the Eastern regions, starting from the reign of Peter the Great, who was the first to realize Russia's "noble calling to liberate the Christian peoples suffering under the Muslim yoke" (Эзов, Г. 1898. *Сношения Петра Великаго с армянским народом*. С.-Петербург: Типография Императорской академии наук, II). Yezov's book is a historiographical monument which, paying homage to the policies of the authorities of the time, links the aims of the Armenian liberation idea and the tsarist colonial policies. In 1901, Leo's work titled *Haykakan t'pagrut'yun* (Armenian Printing), which had previously been published in segments in the *Mshak* newspaper, was published as a separate tome. Here, against the backdrop of the history of Armenian printing, Leo also presents the liberation arguments in the Early modern period, dating 1547 as their starting point, when Stepanos, the Catholicos of Echmiadzin, set off for Europe in the hope of finding avenues of salvation for the Armenian people. Next, Leo passes the liberation baton to Stepanos's fellow clergyman Abgar Yevdokatsi, who also made his way to Europe on the same issue in 1564. (Leo 1904. *Haykakan t'pagrut'yun*. Tbilisi: Hermēs, 84-100). According to Leo, the next attempt towards liberation was made in Echmiadzin in 1678 - an undertaking, which never reached its destination - Europe, because of the Catholicos's death. Nevertheless, it planted a seed for liberation: "the illustrious" Israel Ori (Leo 1904, 341-345). What made Israel Ori illustrious was directing the Armenian liberation idea towards Russia for the first time. With his "Armenian Printing" tome, Leo draws the shape of 16-17th century Armenian history, which persists to this day.

In Germany, Leo's junior colleague Ashot Hovhannisyan carries on with the investigatory research on Israel Ori. His dissertation titled "Israel Ori and the Armenian Liberation Idea" was strongly influenced by Leo. With this work, Hovhannisyan furnishes the space in the liberation idea that Leo had previously created. He links Israel Ori's advent to the Armenian liberation legend, the sources of which he traces back to the 10th century, when the earliest visions and prophecies of liberation appeared, which initially reflected the Byzantine and later the western European orientation of the Armenian liberation thought. Notwithstanding the changes in role distribution among the liberators in the medieval Armenian visions, all of them represented Christendom, which was to liberate Armenians from Muslim rule. According to Hovhannisyan, in the 17th century, the liberation legend "changed from an ideological form into material content" having a "practical application": becoming the Armenian Question (Hovhannisyan 2016, 75). Even though Ori was not

destined to be the “solver” of the Armenian Question, according to Hovhannisyan, “[he] heralded a new era ...finally directed the Armenian Question into a direction which pointed to the future, where, a century after his death, it is finding its solution.” (Hovhannisyan 2016, 429)

In the 1920s, the bourgeois-nationalistic perceptions of the Armenian liberation idea were changing. Leo’s and Ashot Hovhannisyan’s views change first and foremost. In his 1934 book called *Khojayakan Kapital* (Khoja Capital), Leo utterly smashes his former views on the Armenian liberation idea and its preacher, Israel Ori. Thus, based on the fact that many original copies of letters are missing, Leo comes to the conclusion that, in all probability, they had never existed. A multilingual archive, used by Ori during European negotiations seemed quite unlikely to have been established in the 17th-century Armenian *melik* setting. Leo considers the archive to be fake and Ori an imposter (Leo (1934). *Khojayakan kapitalē yev nra k’aghak’akan-hasarakakan derē hayeri mej.* Yerevan: Pethrat, 196-199). In his historiographical works of the tsarist era, Leo, full of admiration for Israel Ori, suggests that despite the fact that Ori was “an enthusiastic individual” whose ideas had not yet spread among Armenians; nevertheless, the direction he set and the efforts he made “are gradually being absorbed into the blood of the nation” (Leo 1904, 533-534). During the short-lasting Soviet modernist era, Leo abruptly renounces his previous position on the matter and criticizes Ori’s individual activities as false. “...professor Heigel did not manage to come up with another explanation for Ori’s undertakings other than that he was just a charlatan. Similarly, [Ghevond] F. Alishan calls him an “adventurer”. However, at the time, the German professor was still unaware of Ori’s fabrications, exposed by Armenian critics - exposures that completely transform the history of his work, stealing away from it the glory of the class movement, if not that of a mass national movement, and leaving merely the falsehood of individual undertakings. (Leo 1934, 244)

In the same way, Ashot Hovhannisyan also withdrew from the historiographical vision of Ori he had held in the tsarist era. The second part of G. Yezov’s work is based on archival materials which, according to the author, were stored in the archives of Moscow, Saint-Petersburg, Bavaria and Vienna. However, to this day, a comprehensive study of the authenticity of the archival materials presented by Yezov has not been conducted; the inventory details of those documents are unknown. In the summer of 1915-1916, Ashot Hovhannisyan went through some of those documents in the main archive of the former Ministry of Foreign Affairs

in Moscow, only to detect a number of falsifications and inaccuracies that cast doubt on the authenticity of the sources cited by G. Yezov. He discovered that all the documents were produced by the same individual – Israel Ori’s companion, Archimandrite Minas (Yovhannisean, A. 1921. *Hay-rus orientats'ia yi tsagman khndirĕ*. Etchmiadzin: Tparan gitakan instituti, 21) and they were written in Moscow (Yovhannisean 1921, 26). The majority of the documents were “absolute fabrications” (Yovhannisean 1921, 26). As a result, Hovhannisyan came to the conclusion that the speaking about nationwide Russophilia among Armenians at the beginning of the 18th century was premature. It is possible to say that some pro-Russian manifestations started to appear in the 1720s, when groups of Persian-Armenians, repressed after anti-Persian rebellions, had to pin their hopes on Russian support. “Prior to that, Israel Ori and Archimandrite Minas’s effort to present that hope to the Russians as a popular political phenomenon, was a diplomatic game with no real basis in the Armenian consciousness of the time.” (Yovhannisean 1921, 63-64)

With this, he refuted his own thesis from the pre-revolutionary period, which claimed that in the times of Israel Ori, Armenians had political expectations of Russia (Hovhannisyan 2016, 41). Hovhannisyan concluded that, “the so-called “pro-Russian orientation” of the Armenian people was not a discernible phenomenon. . . Not only was there no such expectation but there was an apparent resistance to the idea of tying the Armenians’ political fortunes to Russia” (Yovhannisean 1921, 53). At the end of the book, Hovhannisyan confesses that the pre-revolutionary perceptions of history had served the political interests of the nation’s dominant class; the October Revolution had created a new situation where it was possible to examine the historical past, free of the domination of the ruling social classes. “There was a time when the dominant class could perceive the present-day interpretations of the origin of pro-Russian orientation of Armenians as a sign of unreliability. Times have changed and now, the defeated social classes might find consolation in the same interpretation of the matter...” (Yovhannisean 1921, 67) It is important to consider Hovhannisyan’s Marxist perspective here, the position he takes in historiography in support of the oppressed and exploited classes, and his rejection of the role of interpreter of the social elite’s political expectations. He boldly exposes the class nature of the tsarist era bourgeois interpretation of the Armenian liberation idea: “Foreign and unfamiliar to the laboring class and an artificial graft in its political mentality, pro-Russian orientation seemed to be the only path of salvation for the dying shoots of Armenian feudalism, at a time when the Russian regime was

considered to be the sole protector of class rights and privileges in Transcaucasia, against decaying despotism and exploding dynastic rule. However, with its centuries-long political experience, the Armenian secular and ecclesiastical feudalism first nourished, but eventually exhausted the last chance of its own existence in the furnace of the withdrawal of Islam and the victory of tsarism. Succeeding the apostate clergy and aristocracy, the Armenian bourgeoisie inherited the submissive nature of their political orientation. The Russian regime was a reliable protector of the private property system for the commercial and industrial class, which had acquired social dominance. The example was contagious. Thus, the national bourgeoisie followed a wavering political path, staying faithful to its social character. However, prone to the corruptive influence of capital and being a slave to its political wisdom, it obeyed the Russian *knout*, seeking protection sometimes from the attacks of “lawless” Turks, and sometimes from the fear of its “familiar” proletariat.” (Yovhannisean 1921, 67-68)

However, Stalinism utterly destroyed the foundations of Armenian Marxist historiography. Returning from exile, Ashot Hovhannisyan undertook the task of implementing the party elite’s politically motivated directive in the field of historiography. In 1955, he defended his doctoral dissertation titled “*Episodes in the History of Armenian Liberation Thought*” at the Institute of History of the National Academy of Sciences, Armenian SSR, and published a two-volume homonymous tome in 1957-1959. The revolutionary red star of the 1920s had faded in the firmament. Hovhannisyan had to renounce his political enthusiasm and historiographical perceptions of the proceeding era. Moreover, he had to edit out the “errors” made in the 1920s and adjust his historiographical opinions to the new political climate. “*Episodes in the History of Armenian Liberation Thought*” became the instrument that served as political atonement. With this work, he not only returned to his pre-revolutionary historiographical perceptions, which had been the result of the political expectations of the national elite, but his historiographical conclusions and assessments went beyond the limits set in the pre-revolutionary era. So, as previously mentioned, in the tsarist era the historian linked the pro-Russian orientation of Armenians to Israel Ori, claiming that prior to that there was no literary-historic information on the Armenians’ pro-Russian orientation (Hovhannisyan 2016, 41). As also noted above, in the revolutionary period of the 1920s, he considered this dating to be – in his own words - “an inaccurate perspective on the origin of the Russian orientation” (Yovhannisean 1921, V). Nonetheless, in the 1950s, Hovhannisyan

attempted an unbelievable act of manipulation. With the intention of strengthening the idea of the pro-Russian orientation of the Armenians, he claimed that the historical bond between Russians and Armenians dated back to an even earlier period than the 18th century, stating that the “cultural-political paths connecting Armenians with Russia” went back as early as the 9th-8th centuries B.C., and continued uninterrupted until the 17th-18th centuries – the historical period of Israel Ori (Hovhannisyanyan 1959, 419-492; Hovhannisyanyan, A. 1958. Hayeri rusakan koghmno-roshman patmut’yunits’. *Patma-banasirakan handes*, 1, 65-109) If, in his dissertation of 1913, Hovhannisyanyan suggested that Ori’s liberation project was “the manifestation of the self-interests of the melik class” (Hovhannisyanyan 2016, 423), in his 1921 book called “*The Issue of the Origin of the Pro-Russian Orientation*”, he claimed Armenians’ pro-Russian orientation to have been the preference of the Armenian clerical and secular feudal class and subsequently the bourgeoisie, “foreign and unfamiliar to the laboring class, an artificial graft in its political mentality” (Yovhannisean 1921, 67). Then in the 1950s, Hovhannisyanyan viewed the Armenian liberation idea as an idea shared by all social groups: the clergy, the feudal class, urban and rural populations; and accordingly examined its manifestations inside each separate social group, without drawing much attention to social contradictions and class conflicts. He reduced the liberation ambitions of separate groups into a single national ambition, directed against foreign rule. While a student in Germany, Hovhannisyanyan, dating the origin of the liberation idea back to the 10th century, regarded it as “an ideological form” until the 17th century, yet in the first volume of “Episodes” he tried to provide the liberation idea with a practical content, starting as far back as from the 5th century, the era of the fall of the Armenian Kingdom. Hovhannisyanyan’s “Episodes”, a huge two-volume tome, served as a historiographical pedestal to be placed under Israel Ori’s feet, and to legitimize the ideological and practical content of the Armenians’ pro-Russian orientation as characteristic of all Armenians. Hovhannisyanyan’s effort to endorse this political orientation is really powerful; “While some sectors of the Russian people held the belief that there will come a day when the Messiah will return, descending from the “Mountains of Ararat” and the “Lands of the Armenians,” to liberate the world from the tyranny of the Antichrist, based on opposite perceptions, the head of the Armenian liberation movement [Israel Ori – G.A.] was to come from the “Mountains of Ararat” and the “Lands of the Armenians” to proclaim that the savior of the world, the Messiah himself, would

emerge from Moscow as the new deliverer and would bring the Antichrist's cruel kingdom to an end" (Hovhannisyan 1959, 14)

There is no doubt that Ashot Hovhannisyan was a talented historian, who could not only masterfully use the subtle tricks of pseudo-Marxist historiography to maintain an illusion of materialist historiography, but would also intentionally deprive primary source testimonies of their political and social messages, and even take them out of context, to serve the political content of his own texts (see the unpublished article of G. Ayvazyan, *The work of Eremia Komurjian "Aṛ t'agaworn Lehats'"*). This is not surprising in the least, especially given the fact that on the one hand, the current source information on Israel Ori and his work is thoroughly fabricated and, on the other hand, that not one verified Armenian source has left a testimony on the liberator of the Armenian people, Ori. Even Leo confessed this, when he was praising Ori. (Leo 1904, 533) To understand the role of source criticism in Soviet historiography, we must return to J. Stalin's 1931 letter to the "Пролетарская революция" newspaper. In this letter, he claimed that historiography that was based on archival materials and documents was in fact bureaucracy, the business of "archive rats", and urged historiography to base the study of phenomena on the activities of Bolshevism. The history of Armenian liberation, a central topic in the Soviet historiographical system, was not so much a reflection of archival facts, as a manifestation of the tsarist, and later, Soviet political agendas: to demonstrate the centuries-long aspirations of the Armenians to be liberated from Muslim rule were eventually realized through Russian expansionist arms. In this case, the information provided by the primary sources was not the laboratory, where the Soviet historian conducted source study from the theoretical perspective of Marxism; rather, they were merely a tool that served the liberation idea that had already been formulated by the political elite. This is the reason why the sources were often provided partially, out of context, with no consideration of the social and political context of the text, as their purpose was to serve the already drawn conclusion: the Soviet interpretation of the liberation idea.

In the Soviet-Armenian historiographical system, Armenian history of the Early modern period was limited to the history of liberation movements. It was mainly presented as the history of liberation from Muslim rule. University history textbooks and academic publications present the Armenian history of the 16th-18th centuries based on a mixture of Leo's and Ashot Hovhannisyan's pre-revolutionary and Stalinist era historical visions.

The Armenian liberation idea of the Early modern period had two opposing interpretations in the Soviet period. The first was formulated in the 1920s, when the approaches of the bourgeois-national historiography of the tsarist period were heavily criticized. The previous dating of the pro-Russian orientation of the Armenians - the end of the 17th century - was refuted, only dating the first traces of the pro-Russian orientation to the 1720s. The forefather of the Armenian liberation movement Israel Ori was considered an adventurer, whose activity was not widely supported; on the contrary, it had even provoked resistance. The sources indicating Ori's undertakings for liberation were shown to be unreliable. There is no information about Ori in the Armenian sources, and the letters kept in European and Russian archives should be thoroughly studied. Some of them have been studied and have been revealed to be fake. The Soviet-Armenian historiographical thought of the 1920s viewed the liberation movements of the Early modern period as the political project of the Armenian secular and religious feudal class, and subsequently the bourgeoisie; one that was entirely foreign to the mentality of the exploited masses. However, in the (post) Stalinist era, these approaches were thoroughly renounced only to return to the historiographical perceptions which best served the interest of Armenian capital in the tsarist era, and were adapted to Stalinist requirements. To reinforce the legitimacy of the liberation idea, Soviet-Armenian historiographical thought went well beyond the boundaries of tsarist era historiography. In particular, the social context of the liberation idea was expanded to incorporate all social classes, the beginning of Russian-Armenian historical bonds was dated back to the 9th-8th century B.C., and the ideological birth of the Armenian liberation idea - to the 5th century.

The Orientalist Nature of Soviet-Armenian Historiographical Thought

The Soviet-Armenian historiographical thought explored and presented the Early modern period solely with the aim of preparing the ground for the establishment of the Russian rule, and historically justifying and substantiating it. To solve this matter, Soviet-Armenian historiography had to create an antipode, against which Russian "liberating" policies would be directed. The antipode was the Turco-Iranian domination, which was presented as evil in both tsarist and post-Stalinist Armenian historiography. The Muslim dominations that existed before Turco-Iranian rule — the ancient Persians, Arabs and Seljuks — were portrayed as "nations that had never been subjected to civilization and culture" (Leo

1969, 37). The status of a backward religion was reserved for Islam, therefore the history of Muslim countries is well-known for numerous "names of ruthless conquerors and heroic dictators" and they have made no contribution to global art and literature. The Turco-Iranian rule, particularly the Turkish one, was presented as an irrational, hideous, gluttonous system where "passion, rage and brutal tendencies" reigned (Leo 1969, 259). Armenians were oppressed and dispossessed both in Iran and Turkey and the Turco-Iranian suppression and violence aroused "furious grumbling and provoked longings for liberation" among different social classes of the Armenian people (Hovhannisyan 1959, 18, 26).

The Soviet-Armenian historiographical system inherited the thesis of bourgeois historiographical thought, according to which historically Armenians had never had regional integration; "In west Asia, Christianity also embraced nations that previously, in the conflict between East and West, had leaned towards the former over the latter – the Armenians were one of those. By converting to Christianity, they permanently drifted away from their neighboring non-Christian nations and became front-line defenders of the West in Asia. Persia, with which Armenians had once been connected through religious principles and cultural notions, became Christian Armenia's irreconcilable enemy. ...As Christianity's front-line guardhouse, Armenia was in a very unfortunate situation. Its geographical location was very unfavorable for it to be able to protect itself from blows coming from the front, and there was no support from the rear, as religious differences had dug a widening abyss between Armenia and Western Christianity. Isolated, Armenia was surrounded by enemies on all sides; however, it continued to faithfully play its role as a Christian country" (Leo 1904, 488-489). Soviet historiography assigned that role of an isolated island to Transcaucasia in general, also including Georgians and Azerbaijanis among the nations under the yoke of Turco-Persian rule. Parallel to this, the role of the church was also being emphasized as the only nationwide organization that, in the name of national collectivity, opposed the "homogenizing and assimilating policies of the rulers", thus playing a huge role in the organization of the national liberation struggle (*Hay zhoghovrdi patmut'yun* 1972, 41, 90). Thus, the church acted as a bulwark and organizer of national monolithicity, and so the study of its class and social functions was pushed into the background. Soviet-Armenian historiography briefly touches upon, but does not explain, the institution of dhimmitude in Muslim systems. The reason is probably the bourgeois-(post) Stalinist interpretation of the idea of liberation, which saw weapons as the only salvation for Armenians.

These militaristic ambitions did not fit into the system of subjugation. It did not befit the dhimmi Armenians to carry weapons, so they had to be omitted from the pages of history.

It should be noted from the start that the methodology for studying the history of the Turco-Iranian period is also characterized by the mentality prevailing in (post) Stalinist historiography: ignoring the sources or shaping them to fit according to the end result of the research that the source information is intended to serve. Sources were only utilized under the flywheel of the historiographic machine; they were assembled section by section, becoming the static background image necessary for the legitimation of the political messages of Soviet historiography. It is neither a coincidence nor a surprise that the historians who founded the branch of study of the period in question, particularly Leo and Ashot Hovhannissyan, knew neither Persian nor Ottoman Turkish, and therefore did not have any Turkish or Persian sources on the period; so, when writing the history of these empires, they predominantly used the information provided by European and Russian sources. The following are the most-used works: Pitton de Tournefort, "Relations d'un voyage de Levant", 3 vol. (Lyon, 1717); Jean Chardin, "Voyage en Perse et autres lieux d'Orient" (Royaumont, 1723); Paul Ricaut, "The Present State of the Ottoman Empire", (Printed for C. Brome, 1665) - Soviet-Armenian historians used the same, in French "Histoire de l'état présent de l'Empire Ottoman" (Paris, 1670); Raphaël du Mans, "Estat de la Perse en 1660", 20 vol. (Paris, 1890); and Thomas Thornton, "The present state of Turkey" (London, 1807) - the same in French "Etat actuel de la Turquie" (Paris, 1812). The Ottoman Empire granted the first commercial capitulations to France and England in the 16th century, giving these countries the right to enter the territory of the Ottoman Empire and conduct trade. However, it is well known that trade does not come alone; along with merchants, large groups of missionaries, travelers, and diplomats headed to the East, each launching their own agenda. The above-mentioned authors, who served as benchmarks for Soviet-Armenian historiography studying the Early modern period of Armenian history, were included in these professional echelons heading from Europe to the East. Their works were political texts expressing, first of all, the civic affiliation and social-societal standing of their authors, and were called to serve the interests of France and England in the East. These diary notes and studies later became the foundation stone on which the huge building of knowledge about the East was built in Europe. With the humility of an obedient servant, European Oriental studies began to greatly replicate the expansionist plans of political

systems, preparing the soil for their implementation. The Oriental studies systems were developing and producing contexts and targeted knowledge about the East, to lay the ground for European colonization.

Soviet-Armenian historiography is greatly influenced by European oriental knowledge, and has used it to resist its own political challenges. Soviet-Armenian historiographical thought had a key task in its study of the Early modern period of Armenian history: a mission to formulate Russia's entry into the Transcaucasia in the early 19th century and its military-political interests in the region as its commitment to the liberation of local peoples. The depositories of European Orientalism provided a wealth of material for Soviet-Armenian historiography to achieve this goal, to characterize the Turco-Iranian rule in the region, thereby contrasting it with the new Russian rule - a domination the colonial, expansionist, exploitative nature of which was not properly assessed by (post) Stalinist historiography, but on the contrary was presented as a new chapter, a new period in Armenian history.

With the exception of the history of liberation movements other, distinct, issues of early modern Armenian history have been little studied in Soviet-Armenian historiography. In the Soviet historiographical system, programmatic themes were defined that had more of a background significance in the history of the liberation movements, rather than being examined as research problems. There were a few background themes created by Soviet-Armenian historiography on the Turco-Iranian period which are repeated in almost all studies. On the one hand, they have a pronounced orientalist nature; on the other hand, they provide the necessary background to reimagine the negative Turco-Iranian period. Thus, in order to preserve recollections of materialistic historiography, socio-economic history was emphasized - presented very matter-of-factly and schematically. The main narrative lists the types of taxes and the unbearable tax policies. This is followed by the Turco-Iranian wars of the 16th-17th centuries. Usually, the onset of the Early modern period begins with grim descriptions of these wars. The destructive consequences of those wars on the life of the Armenian people and the migrations and deportations that took place in that period are presented. However, the more emotional and emphasized the descriptions of war are, the poorer their analytical basis is. The next thematic preference is the Ottoman practice of *devshirme* ("child levi" or "blood tax"), which is presented as a catastrophe, cutting young children off from their parents and family environment to brutally force them to serve the needs of the Ottoman court. Soviet historiography ignores the conclusions of the historians of the

Ottoman period that these recruitments of children were in fact even preferred by the non-Muslim population of the Ottoman Empire because they paved the way for them to enter the Ottoman court and created opportunities for progress. An integral part of the presentation of the history of that period are the obligatory references to earthquakes, fires, natural and man-made disasters, which also come to intensify the drabness required for the historical context. One of the important components of the Soviet-Armenian interpretation of the history of the Ottoman Empire is the history of the Celali rebellions. It is well known that these rebellions took place in the Anatolian part of the empire in particular, and had strong political, social, and economic motives, but Soviet-Armenian historiography presents the Celali rebellions as an evil to which the Armenian people were subjected. Soviet-Armenian historiography shows no sympathy for these uprisings, which were aimed against the central government and, for more than a century and a half (1550-1700), contained great energy for social revolt. Soviet-Armenian historiography erased the socio-political significance of these rebellions, and fit them in to serve its agenda except, perhaps, for the Abaza Pasha rebellion in Erzurum in 1622 - which was clearly favored by the Armenian sources. It should be stated that as much as the Armenian sources, written in the church as political texts, are centripetal towards the authorities, even they have preserved evidence that affinity was raised among Armenian circles towards these uprisings and movements, but these testimonies have not been included in Soviet-Armenian historiography.

The criticism of Orientalism in the West only began in the 1970s with the orientalism theory founded by Edward Said, and subsequent postcolonial theories. It is well known that in his 1978 book 'Orientalism', Edward Said also criticized Marx's Orientalist views, showing that Marx constructed and shaped his knowledge of the East on European Orientalist science. Not only was Soviet-Armenian historiographical thought unfamiliar with the criticisms of Orientalism and colonialism, but it did not derive the study of the history of the Turco-Persian period from Marxist theory, instead basing the study of history on nationalist approaches. Soviet-Armenian historiography juxtaposed the Armenians and other peoples of the Transcaucasia with the geopolitical environment in which they lived during the period in question, describing the Turco-Iranian period of their history in the gloomiest colors. The study of social and class contradictions was superseded by obligatory descriptions of historical events aimed at emphasizing the necessity for the Russian intervention. The source study of Soviet-Armenian historiography was

constructed and shaped mainly on the studies and memoirs of European travelers and diplomats, who were sanctifying European expansionist policies in the East. Later, they were also a convenient tool in the hands of Soviet historiography to promote Russian expansionism in the East.

The Study in Soviet Armenia of the History of Turkish-Armenians

It has already been mentioned that Soviet-Armenian historiographical thought considered the Turkish rule in the period under discussion "more cruel and wretched", than the Iranian one. The Ottoman regime is described as "savage", "bloody rule of the Ottoman conquerors" found at the "lowest barbaric level" (Zulalyan 1980, 5, 52, 322). In Soviet-Armenian historiography, Turkish-Armenians were subjected to religious and national discrimination, violence, had no security of life and property, and were constantly at risk of physical extermination (Zulalyan 1980, 257, 322). Hence, under these conditions, the idea that *"the Armenian people can only be liberated from the yoke of Turkish slavery with the help of great and powerful Russia"* also took root in Turkish-Armenians (Zulalyan 1980, 81). It is crucial that Turkey was the main target of the Armenian liberation struggle. Even the liberation struggle of the Armenians of Iran was directed not against Iran but against Turkey, as was stressed numerous times by Ashot Hovhannisyan (Hovhannisyan 1959, 57, 107, 109, 173, 179, 189, 190, 197, 409).

Hakob Anasyan's research "The Liberation Movements of the 17th Century in Western Armenia" was written to show the historiographical basis of the Armenian liberation movement against Turkey, the purpose of which was to show the struggle of Armenians against Turkish rule in the 1660s, the "errancy" of their European orientation, and Russia's historical role as "the main anchor of the Armenian aspirations for liberation." Ashot Hovhannisyan assigned Hakob Anasyan to write this study. However, he was dissatisfied with Anasyan's work and pointed out substantive faults in the study, in some cases providing grounds for new misunderstandings himself (Hovhannisyan, A. 1963. H.S. Anasyan, XVII dari azatagrakan sharjumnern Arevmtyan Hayastanum, Erevan, 1961, 442 ēj. *Patma-banasirakan handes*, 1, 235-248). Hovhannisyan's main criticism refers to the separation of the Eastern Armenian and Western Armenian liberation movements. He insists that the struggle of the two Armenian directions developed in similar socio-political situations and was directed against Turkey (Hovhannisyan 1963, 243). Thus, Soviet-Armenian historiographical thought describes the Armenians of the Early

modern period as a single unified system, free from political differences. However, attributing a socio-political commonality to the two Armenian parts is not proven by historical facts. The Early modern period is marked by sharp contrasts between Eastern and Western Armenians. There were active political processes in the Ottoman Empire to establish an anti-See Catholicosate. The supremacy of Etchmiadzin is questioned and is resisted. Living in two different state systems - the Ottoman and the Iranian - dictates a modification of the monocentric system of government. The separatists did not have deep ideological contradictions with the church and did not reject the doctrine of the Armenian Church, but they had economic and political motives to secede from the authority of the Mother See. In this struggle, the parties were also able to involve representatives of the ruling elites, trying to interest them in viewing the Armenian issue against the background of the Ottoman-Iranian rivalry. These events, which have played a key role in the Early modern period of the Armenian history, are presented briefly in Soviet-Armenian historiography, mainly condemning them as "divisive activity." The task is set, on the one hand, to create the illusion of national monolithicity and solidarity, and on the other hand, to prematurely attribute liberation aspirations to the Turkish-Armenians.

The same mechanisms of historiography that were used to study the history of the Eastern Armenian liberation movements are also applied to the Western Armenians. Data in the Armenian and Turkish sources of the period are not taken into account, and the history of liberation is built on weak source criticism. Consequently, H. Anasyan's research is largely based on the few letters kept in French archival and printed collections, the authors of which have, one way or another, touched upon the issue of liberation of Armenians under French auspices. It is difficult to attribute a nationwide or even class liberation mission to their authors. The Ottoman Empire was still in a stable political situation in the 17th century, and it is hyperbole to attribute liberation movements to Armenians in this period. So, one of the documents presented is the Armenian Catholicos of Cilici, Khachatur Gaghatatsi's, letter to King Louis XIV of France (February 12, 1663) and the other is Khoja Murad's message to the same king (January, 1673) Khachatur Gaghatasi did refer to the liberation prophecy; however, he only wanted the French king to "instruct his ambassador of Constantinople, and the consul of Aleppo, to always protect the poor Armenian nation", if he so pleased. (Anasyan, H. 1961, *XVII dari azatagrakan sharjumnern Arevmtyan Hayastanum*. Yerevan: HSSR GA hrat., 284).

These connections to the French by Gaghatatsi are explained by the French influence and commercial interests in Syria. Moreover, even if Gaghatatsi had any aspirations for liberation, he represented only the Armenian Catholicosate of Cilicia, and could not claim to represent the Armenian population of the Ottoman Empire. It is also dubious that Western Armenian affiliation was attributed to Khoja Murad. Even though he wrote directly about the rebellion against the sultan, he spoke not on behalf of the Western Armenians, but of the Christians of the East.

In the large anti-Turk front, he attributes the Western Armenians with causing confusion within Anatolia, and even then, only in the event of the advance of the French, Russian and Persian troops (Anasyan 1961, 299-300). The idea of Western Armenian liberation was much fainter in the Early modern period than the Eastern one. Even the phrase 'liberation movement' is exaggerated, as there were no movements of liberation from Ottoman rule per se during the period under discussion. The extracts of the preserved liberation texts are very fragmentary, expressing the individual goals of their authors, rather than having a class nature, let alone a nationwide one. The aspirations of Soviet-Armenian historiographical thought to show Western Armenian liberation movements in the Early modern period are weak and futile. First of all, this is due to the fact that the Russian expansionist policy in the east of Turkey did not have tangible results, and the plan for the Russian liberation of the Western Armenians remained unaccomplished.

Conclusion

The Soviet interpretation of Armenian history of the 16th-18th centuries has been subject to woeful distortion. The Marxist-materialist theory of history was at the very core of the intellectual movement that began after the Great October Socialist Revolution of 1917. Guided by these theoretical perceptions, the tendencies of reappraisal of Armenian history began in the 1920s; the ideological currents of the tsarist period were criticized, including the bourgeois-nationalist orientation. The philological thought subjected the Russian-Armenian enlightenment of the 19th century to Marxist criticism, qualifying it as the ideological advocacy of industrial capital, nationalism and the militant bourgeoisie, and an obstacle to international education and the friendship of peoples. Many proponents of this direction reviewed their previous approaches in the 1920s and joined the materialist school of historiography. However, from the very beginning of the next decade, the Marxist tendencies of the 1920s came under strict control and regulation, drawing closer towards the posi-

tivist perception of history and formalizing Marxist historiographical views. Joseph Stalin's political course greatly influenced and guided Soviet historiographical thought. The Stalinist position required that historiography should stem not from primary sources but from the activities of the party. With the publication of the book "Short Course" in 1938, the "arbitrariness and disorder" of writing party history was put to an end. Under the influence of Stalinist historiography, Soviet-Armenian historiographical thought retreated from the modernist autonomous tendencies that had begun in the 1920s and transitioned to a centralized party-controlled historiography. The Marxist perception of history receded. Some Marxist dogmas introduced by the Communist Party provided a formal backdrop for the perceived existence of Marx's ideology in the Soviet Union. Historiography fits into the Soviet bureaucratic apparatus, playing a key role in party propaganda tools. The Stalinist era, and then World War II, revived the historiographical perceptions of 19th-century Russian-Armenian nationalist-bourgeoisie, which combined the colonial policy of tsarism with the Armenian national liberation achievements. The history of the national liberation movements became the core of the Armenian history of the 16th-18th centuries in the Soviet-Armenian historiography system, which was formulated by Leo and Ashot Hovhannisyan. The former gave a liberal-nationalist interpretation of the idea of liberation, making it serve the interests of Russian-Armenian capital, and the latter provided its (post) Stalinist political content. The Marxist-materialist perception of history was replaced by an idealistic one. The manifestations of Marxist historiography of the 1920s were qualified as "vulgar sociology, vulgar materialism", etc. In historiography, social-class antagonisms and contradictions gave way to nationalism. Armenian history was placed within the framework of Russia's expansionist policy, and the idea of Armenian liberation was derived from the power of Russian weapons. Soviet-Armenian historiography interpreted the Armenian history of the Turco-Iranian period from a pronounced Orientalist viewpoint, juxtaposing the Armenians with the historical environment in which they had lived. The Soviet-Armenian interpretation of the Armenian liberation idea is anti-Marxist; it replicates the interests of Stalinist policies. In deepening the historical foundations of the pro-Russian orientation of the Armenians, Soviet-Armenian historiography even surpassed the imagination of the bourgeois-nationalist Russian-Armenian historiography thought and expanded the ideological and material content of the Armenian liberation idea, and its social belonging. The historiographical machine shaped and produced a perception of the Armenian history of

the 16th-18th centuries, which was stamped in a totalitarian manner from top to bottom, depriving the Soviet-Armenian society of the opportunity to become knowledgeable about its own history. During the Soviet era, historical falsification was patented and inserted into all spheres of public life as scientific truth. The Soviet-Armenian perception of the idea of liberation fetters and narrows the historical horizons of the mind of the Armenian people, who have paid the highest price for liberation. It derives on the one hand from the interests of imperial and Armenian capital and on the other hand, from Stalinist political mentality, depriving other liberation projects of their legitimacy.

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Turkish Historiography on the Forced Migration of the Turks of Bulgaria to Turkey of 1989

Abstract: *The history of the Turks of Bulgaria, following the forced migration that took place in 1989, became a topic highly studied in the Turkish academia. Although many scholars who are focused on the topic are in consensus about what happened between 1984 and 1989, it is less so the case in the period prior to it. In this study of reviewing the Turkish literature (or literature in Turkish) on the Forced Migration of 1989, it is aimed to provide the opinions and comments written by the Turkish scholars on the relations between the Turks and the Bulgarians of Bulgaria regarding the Forced Migration of 1989 and to show that there are discrepancies in the periodizations of the history of Bulgaria even though the main narratives overlap each other almost unanimously. To do so, this study features the interpretations of the agricultural and educational policies in Bulgaria and the dates of changes in these policies according to the scholars and researchers will be provided. The basis of their interpretations will also be included. Finally the perception of the identity of the Turks of Bulgaria prior to 1984 and its relations to that of Turks of Turkey after 1989 will be examined.*

Key words: *Forced Migration of 1989; Turks of Bulgaria; literature review; identity.*

The Forced Migration of the Turks of Bulgaria to Turkey in 1989 is a well-studied topic within the Turkish academia. The wide scope of the literature includes both the historical processes and the aftermaths of them. We aim to investigate the literature dedicated to the Forced Migration of 1989 and our work is restricted to the literature intended to cover only this topic, but, it is most likely that studies covering related topics

have their own narratives and interpretations on the Forced Migration of 1989. Yet, they will not be included into this study unless they have separate sections dedicated to the topic. Moreover, this study includes only the literature written in Turkish for, as we plan to provide, the topics covered in the literature deal mostly with the historical background of the assimilation and forced migration and emphasize that the interactions between the Turks of Bulgaria and the Bulgarian government(s) are based on conflicts, an approach slightly different than what has been suggested by Barbara Jelavich (1983) and Mark Mazower (2000) who, regardless of the fact that the outcomes and results of such policies, prefer to assign modernity as the driving force of all the sovereign states in the Balkan Peninsula to homogenize their populations. In this study, the history of Bulgaria in the literature too is taken into consideration and the education and agricultural policies of Bulgaria along with the identity of the Turks of Bulgaria that the researchers emphasize will form the main sections of this paper.

As we define our limits for the study, we also aim to analyze and evaluate the discourses on the continuums in the history of Bulgaria and the language used in the articles and books as they form unified narratives in certain points. Thus, the main question of this work is based on how the narratives in the previous studies intersect each other, which topics received the most attention, and, finally, which points are emphasized more and from which source they appear. Venturing from this point, we aim to focus on the literature on the Forced Migration of 1989 and try to point out the concurrent discourses within the literature.

One of the main points in the literature on the assimilation policies of 1984-1989 and the Forced Migration of 1989 is how the Bulgarian State, starting from 1878, had never changed its policy toward the Turks and Muslims. This perception of the Bulgarian State(s) assumes that even though different regimes came into power in Bulgaria, the policies used by each remained more or less intact. And the concepts such as “Bulgarians”, “Bulgaria” and “Bulgarian governments” are used interchangeably in the literature, thus meddling the concepts “people”, “state”, and “regime” in one another as if they are all placed against the Turkish identity as “the other” or vice versa. This image is constructed, or almost reinvented, against the seemingly all-tolerant Ottoman Empire in its relation with the Bulgarians as the empire had never marginalized its subjects, according to Turhan Çetin (2008). Against this image of the Ottoman, on the other hand, is placed a Bulgaria which had forgotten this policy of tolerance already in 1878 (Çetin, 2008). Emin Atasoy (2018), in accord

with Turhan Çetin, claims that the de-Ottomanization process had taken place beginning from the era of the Principality of Bulgaria. The policy of assimilation and forced migration are, thus, believed to be taking “revenge” (Atasoy 2018, 43) of the Ottoman period.

In some studies, it is pointed out that Bulgaria’s effort to form a homogenous Bulgaria by assimilation and forced migrations against the Turkish population had not changed between 1878 and 1989, thus marking the Forced Migration of 1989 as the end point of the Bulgarian history in its relations with the Turkish and Muslim minorities (Çetin 2008; İnginar Kemaloğlu 2012; Zafer 2018; Demirhan 2019b; Kayapınar 2019-2020). From this perspective, these scholars assume that it was almost a state of nature that the forced migrations took place. Jelavich (1983) and Mazower (2000), too, as we mentioned above, emphasize that each Balkan state, including Turkey, resorted to such policies to achieve ethnically homogenous populations. Though the end points of both the Turkish scholarship and the aforementioned scholarship in English are the same, they differ in explaining the reasons behind such policies, the former constructing its narratives on a clash between the Turkish and Bulgarian communities whereas the latter points out the urge for these states to form unified populations. In order to support such an inference of the Turkish scholarship on the topic, the history of Bulgaria is taken into account as a seemingly uniform process. Yet again, even though the discourses on the topic suggest an unchanging policy to assimilate the Turkish population into Bulgaria throughout the history, the dates of changes in policies do occur in the literature with ambiguities in the periods. For example, Ömer Lütem (2012) refers to the period before WWII as the period of unsuccessful assimilation policies and dates the starting point of the systemic oppressive policies in 1984 whereas the period between 1968 and 1984 is referred to by him as “the Spring weather” (2012, 140). He also claims that the Bulgarian Communist Party returned to the policy of assimilation in 1950-1951 after a short period of tolerance. Mustafa Türkeş (2012), on the other hand, defines the periods 1919-1923 and 1944-1951 as exceptions in the Bulgarian history whereas Ali Dayıoğlu (2005) points to the periods between 1919-1923 and 1944-1947 as periods of positive changes. Hüseyin Avni Bıçaklı (2016), contradicting his assessment, first claims that it was the period between 1930 and 1936 that the Bulgarian government pursued relatively more democratic policies and then argues that the change in the government after the Bulgarian Agrarian National Union initiated the oppressive policies against the Turkish minority. Another interpretation by Orlin Sabev (2012) classifies

the years between 1878-1944 as a nationalist-religious period while the period between 1944-1989 a nationalist-communist one without referring to any period of tolerance. Neriman Ersoy (2012), on the contrary, underlines that the policy of assimilation started already in 1944. Sait Öztürk (2012), however, states that the Communist Party of Bulgaria reinforced the Turkish identity in the first years of the “Fatherland Front” since such policies were in the party's favor. Contrary to the aforementioned studies, he warns the risks of assuming that both the Bulgarian communists and nationalists share common perspectives as it may lead to an a-historicized and an essentialist understanding of the Bulgarian history.

The two aspects of these uninterrupted policies throughout the history of Bulgaria against the Turks and Muslims can be seen in the interpretation of the educational and agricultural policies during the communist period. The general perception in the literature emphasizes the continuum in the policies of education as well. Hasan Demirhan (2019b) states that the authority of the Turkish schools were being gradually transferred to the “Bulgars” starting from 1946, the schools were then begun to be Bulgarianized in 1958-1959, and finally were closed down altogether in the 1970s. Yücel Yiğit (2012), too, mentions a process of increasing oppression which started in the 1950s, culminating and resulting in the policy of full-assimilation. Emin Atasoy (2018), on the other hand, refers to the period of 1944-1956 as “a period of ethnic tolerance”, in which the Turkish communities had their own schools, journals, newspapers, radio and television channels. Mehmet Akpınar and Süleyman Köksal (2016), in accord with Atasoy, underline that the Turkish communities had flourished until the mid-1950s. Bülent Yıldırım (2020) emphasizes that the Turkish schools were nationalized starting from 1946; he does not evaluate any further development as other scholars do. Mümin İsov (2014), on the contrary, takes a completely different side and blames the Bulgarian governments for their neglect of the education of the Turks of Bulgaria and claims that the governments did not take the measures to improve the conditions for the Turks. Hüseyin Memişođlu (2002), instead, accepts that the early years of communism witnessed improvements in the status of the education of the Turks even though the socialization/nationalization of education was highly unpopular among the Turks of Bulgaria. Yet, according to him, it was in 1958 that the “Bulgarian racist communist administration could not abide the improvement of the education of the Turks,” (2002, p. 64) merging the minority schools of the Turks with those of Bulgarians. Thus, the literature

leaves us with contradictory dates and applications on the educational policies that were applied in the second half of the 20th century Bulgaria.

The agricultural policies in Bulgaria are, too, presented in a similar vein. The narrative on the Bulgarian attacks on the Turks after Bulgaria gained its autonomy from the Ottoman Empire by Hasan Demirhan (2019a), for example, underlines that the assaults were mainly against those Turks who were affluent. Or, as he states (2019c), the Communist Party's attempt to increase its control in the state is considered as another policy of assimilation against the Turks and Muslims in a similar fashion. Though it was stated that some of the Turks who were poorer were more eager to join the TKZSs, the agricultural cooperatives, than those who were more affluent in terms of land ownership, the reasons behind the formations of such cooperatives are explained as the new Bulgarian government's intention to strip the Turks off their lands which, according to Çetin (2010), had been infertile and barren until the Turks peopled them and built new villages, towns, and cities. Bülent Yıldırım (2020), in a similar fashion, states that it had been the Turks' lands which were nationalized by the communist regime starting from 1949. Even though the differences in classes are mentioned in the study, the effects of the class and social status in such cases are not evaluated and those incidents are simply attached to the national problems already existing between the Turkish and Bulgarian communities. Such narratives leave no room for evaluating the class and social status of the Turks of Bulgaria even though they were explicitly mentioned in the studies of Demirhan and Yıldırım. The studies conducted by Ali Dayıoğlu (2005) and Mehmet Hacısalıhoğlu (2008), in contrast with the aforementioned studies, emphasize a shift in the class structure initiated by the socialization/nationalization of the land. Hacısalıhoğlu argues that following the formation of the TKZSs, the Turkish minority constituted the working body and not the administration even though the policy affected the lands that were populated mostly by the Turks of Bulgaria. And Ali Dayıoğlu (2005) underlines that the policies implemented also affected the Bulgarian population, but it was the minorities who did not have any other means except agriculture, therefore they suffered the most. Emine Alpay (2018), from a different perspective, argues that the policies implemented affected the Turks more due to the rural characteristics of the population, thus implying that the social status of the Turkish minority caused the negative effects of the agricultural policies enabled by the communist regime.

The formation of the Turkish identity in the literature, as well, requires an evaluation. The identity of the Turks and Muslims of Bulgaria is thought to be a uniform one prior to the assimilation policies and the forced migration. By attaching the different Muslim communities each other, it is also claimed that, the policies of forced changes of names had started against the Pomaks, Romas, and Tatars and reached their peaks with the name changings of the “Turks” (Lütem, 2012; Sabev, 2012; Şimşir, 2012; Kamil, 2017; Atasoy, 2018; Demirhan, 2019a; Kurtuluş 2019). The communities, on the contrary, were mostly indifferent to such policies so long they were not affected by them personally. They were indifferent, thus, not only to Muslim communities of different ethnicity but also to those of Turkic ones. For example, Öztürk (2012) stresses the south-north division by pointing out that the policies of forced changes of names were applied first in the south where mostly the Pomaks live and the Turks of North believed that the policies would not affect them. Also, Öztürk (2012) claims that the Turkish communities in Northern Bulgaria, for example, had been told by the Bulgarian authorities that the name changings would be limited to the southern areas and to the communities in the south and he asserts that this was due to lack of nationalistic consciousness of their own. Hasan Demirhan (2019b) asserts that the Turks of Northern Bulgaria believed that the assimilation process was to be limited to the Turks of Southern Bulgaria. Orlin Sabev (2012), too, states that the policies of forced changes of names against the Roma between 1962 and 1980 were not registered as an attack to the Turkish or Muslim identity simply because they were perceived as marginalized in the society. This, in turn, undermined a common resistance against the notorious policy. Zeynep Zafer (2010), as well, puts forward a similar notion and claims that many of the Turks had believed that the assimilation would not apply to all the Turkish and Muslim communities but remain local only.

The identity among the Turks of Bulgaria and of Turkey, too, is believed to be formed in a seemingly similar fashion. Though the Turks of Bulgaria are admitted being of the same origin, they are defined as “consanguine” (*soydaş*)¹, which, eventually, marks the border between the

¹ Didem Daniş and Ayşe Parla interpret the term as “racial kin” whereas we choose to use “consanguine”, for, we believe *soydaş* (literally, of the same lineage) implies something about the blood shared among the Turks of different regions. Darina Vasileva (1992), on the other hand, uses the term “brothers in fate”, which, we believe, is not as inclusive as the Turkish term for the latter is gender-free. Also, the term

Turks of Bulgaria and the Turks of Turkey. Çetin (2008, 56) praises that “with our people’s benevolence, our administrators’ hard work, and our consanguine’ understanding, the problems have been overcome at once.” By praising the cultural elements of the Turkish identity as superior, the Turkish nationalism is constructed in a narrative based on an everlasting history by Tanıl Bora (2017, 98) as “an idea of us, a self-love and collective self-praising”. But in Çetin’s study the reference point for the people is to the Turks of Turkey whereas the Turks of Bulgaria are defined simply as “consanguine”. Such a discourse bears the possibility to confuse the identities into each other and may overlook the hardship the immigrants had to endure. In their study, Didem Danış and Ayşe Parla (2009) shows in which contexts the discourse on “consanguine” becomes crucial by pointing out how the Turks of Bulgaria and the Turks of Iraq have been differentiated by different policies applied to both and how this discourse is utilized both in foreign and interior policies.

In the same vein, the efforts to present a unified identity between the Turks of Turkey and of Bulgaria become more vague when the current literature is examined in more detail since both parties seem to define one another as having different collective identities. It is apparent that the forced migrants who experienced assimilation policies and were forced to migrate have different sets of experiences than the Turks of Turkey who were at the “receiving” end of the migration waves. And, even though it is stated that there were many categories to differentiate these two parties immediately after the forced migration, (Kümbetoğlu, 1997; Şen, 2004; Yiğit, 2012; Balaban and Mehmed, 2014; Kılıçlı, 2019; Hergüvenç, 2020) it is, nonetheless, stated that the process of adaptation for the immigrants took shorter or more easily because the Turkish culture, language, religion, and nation were identical (Çetin, 2008; Kayaşınar, 2012; Yiğit, 2012; Korkmaz and Öztürk, 2017; Kurtuluş, 2019).

To conclude, the literature on the Forced Migration of 1989 requires a re-examination for its current state provides an ambiguous understanding of the history of Bulgaria with its relations to the Turkish and Muslim minorities. In some studies, this understanding of the Bulgarian history fails to provide empirical results, that is to say, the periods of changes in the policies of the “Bulgarias” do not match, and in some cases contradict each other. The interpretations of these policies too require a re-evaluation for some narratives are based on ethnic conflicts between

“brother in fate” implies a unity more in the future whereas the term “soydaş” dwells in the common heritage and history.

the Turks of Bulgaria and Bulgarians as the main factor behind the interactions without considering different approaches such as modernity or class relations, nor do some of these studies evaluate such policies in detail by using archival documents written or published in Bulgarian. Perhaps, Mary C. Neuburger's (2013) emphasis on the tobacco production and the conditions of the Turkish and Pomak peasants can be named as an alternative approach to the reasons behind the conflicts as Neuburger does not explain the tension between two groups by ethnicity, rather underlines the economic relations. This, however, does not suggest that interpreting the conflicts solely based on ethnic tensions stems only from a nationalistic agenda without any academic value. Quite the contrary, as Max Bergholz (2016) points out that the escalation of nationalism in Bosnia during 1990s resulted in re-interpretations of mundane relations between the Bosniaks and Serbs. The two parties, after the beginning of the Serbian aggression against Bosnia, started to perceive the everyday frictions from a nationalistic perspective. A similar reaction can be accepted for the academic writing in Turkey due to the violence imposed on the Turkish and Muslim minorities in Bulgaria between 1984 and 1989.

Finally, we showed how the presentations of the identity (or, better, identities) of the Turks of Bulgaria in most of the aforementioned studies are, in the same manner, fail to render the differences both among the Turks of Bulgaria and between them and the Turks of Turkey. Most of the studies accept an *a priori* Turkish identity among the Turks of Bulgaria even though the opposite view can also be seen in some studies based on fieldwork and in-depth interviews.

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Let's Talk about Archives. Archival *Gordian Knot* in the Soviet Ukrainian-Polish Scholarly Collaboration (the 1950s-1960s)

Abstract: *The article explores an unknown aspect of Soviet Ukrainian-Polish scholarly relations: the collaboration between historians on issues pertaining to archives during the Thaw (1950s-1960s). At the core of this academic collaboration was the desire of Polish scholars to access the former Polish archives, the main bone of contention between the PRL and the USSR. In this paper, I will reveal the mechanism of the Kremlin's control over the archives, as well as the politics of access to them by Poles, which provoked multiple crises at the highest levels. The Soviet politics of scholarship, and particularly of the most ideologized social science, history, differed from that of other countries and other forms of state politics in its tight control and censorship. However, despite the tight control and numerous obstacles, Soviet authorities failed to impose their rules on Polish scholars. Ukrainian historians played an important role as they could procure the necessary archival inventories and provide their Polish colleagues with access to the archives. The foregoing produced results quite opposite to Moscow's expectations, fostering the creation of an informal collaborative network.*

Key words: *academic history, Soviet Ukrainian-Polish relations, access to Soviet archives, informal collaborative network.*

Introduction

Soviet Ukrainian-Polish scholarly relations are of crucial interest for research as they shed light on unknown aspects of the transnational intellectual cooperation that occurred during the (1950s-1960s). Soviet Ukraine and socialist Poland kept tight bilateral relations compared to other countries of the socialist bloc, as they had been bound by the same

history, rules, culture, and lands for many centuries. As Nikita Khrushchev (2004, p. 591), the main promoter of the Thaw in Polish-Soviet relations, accurately mentioned in his memoirs “We have had a special relationship with the Poles. We know each other better and have had more interaction [than other neighboring countries.]

On one hand, socialist Poland (PRL)¹ had to follow the same schema as other countries of the Warsaw pact in the field of academic collaboration; on the other, it was a privileged country in many fields compared to other people's democracies² and to Soviet Ukraine, which had remained a closed country for scholars for many years. However, in spite of tight censorship and Moscow's harsh control, both counterparts established successful academic collaboration and learnt how to avoid Moscow's restrictions.

Academic contacts played an important role for Ukrainian historians who, being limited in all spheres of academic life and locked in the Soviet Union, found the window to the West through socialist Poland. Still, academic mobility was heavily impacted by political events and tight Soviet control over trips abroad.³ The Soviet regime erected what Michael David-Fox (2014, 14) calls the “semipermeable membrane”, which regulated exchanges and contacts with the West. The membrane was double: one valve allowed exit to East European members of the Soviet bloc; and only the next valve regulated access to the “capitalist world”. Ukrainian and Polish scholars used and overused the valve of

¹ Officially Poland was called The Polish People's Republic (Polish: Polska Rzeczpospolita Ludowa, PRL) from 1952 to 1989, while in 1944–1952 it was named as Rzeczpospolita Polska (RP). However, scholars use the name of the PRL to define the whole period from 1947 to 1989.

² To mention only a few publications about the privileged position of Polish scholars: Kula, Marcin, 2010. *Mimo wszystko bliżej Paryż niż Moskwy: książka o Francji, PRL i o nas, historykach* [Closer to Paris than to Moscow: a book about France, the PRL and about us historians] Warszawa: Wydawnictwa Uniwersytetu Warszawskiego; Manteuffel, Tadeusz, 1976. *Historyk wobec historii: rozprawy niezbrane, pisma drobne, wspomnienia* [Historian and history: unpublished essays, letters, memories]. Warszawa: Państwowe Wydawnictwo Naukowe; Pleskot, Patryk, 2020. *Intelektualni Sąsiedzi: Kontakty Historyków Polskich Ze Środowiskiem "Annales" 1945-1989* [Intellectual Neighbors: Contacts of Polish Historians with the French Annales School in 1945-1989s]. Warszawa: Instytut Pamięci Narodowej.

³ For instance, Polish-Soviet relations have been destabilized twice; after the Budapest uprising of 1956 and during Solidarity's heyday in 1980-81. Moreover, while Stalin carefully sealed the borders, Khrushchev's period was one of the most favorable periods for academic mobility and exchange.

state-sponsored collaborations and trips to the people's democracies to work on joint projects.

At the core of these academic contacts was the question of former Polish archives, which after wars and conflicts, remained in Soviet Belarus and Ukraine. For Polish scholars, getting to their former archives was the main motivation for Polish-Soviet academic collaboration. I would even say it was an obsession. They needed it for many reasons, but access to the former Polish archives was rigorously guarded by top Soviet authorities. This article will reveal the complex process to get to Soviet archives by Polish scholars, as well as the motivations and academic interest that stood behind the official policy.

Decisions to restrict access to Soviet archives for foreign scholars were based on the main motivation that the scholar could eventually reveal any slightest doubt about the "friendly", then called "progressive," politics of Russia, the Russian empire or the USSR towards other countries. As the former tsarist regime and Stalin managed the harsh politics and even purges of Poles, the Soviet regime did not want to give access to foreigners, and particularly to Poles. Top Soviet leaders had never trusted Poles, particularly Stalin.⁴

At the core of the academic collaboration was the desire of Polish scholars to access the archives, banned firstly by tsarist, and later by Soviet authorities. They wanted to know the truth about the dark pages of their national history: the tsarist repression and exile to Siberia after the Polish uprising of 1863-64, the execution of Polish communists during Stalin's purges in 1937-38, the Katyn tragedy, the Second World war: all explosive topics for both Soviet power and Poland. Polish historians also needed their former archives in their scholarly research, as the main Polish archives had been destroyed during the Second World war or seized by both Nazi and Soviet authorities.

The Soviet politics of scholarship, and particularly of the most ideologized social science, history, differed from that of other countries and other forms of state politics in its tight control and censorship. In order to get this efficient control, the Soviet Union created its own structures and mechanisms of oversight, including controlling access to the archives. In this paper, I will focus on the mechanism of the Kremlin's control over the archives, as well as the politics of access to them by Poles. How was

⁴ Khrushchev describes well Stalin's Polonophobia. Khrushchev, Sergei, 2007. *Memoirs of Nikita Khrushchev*, Volume 3 Statesman [1953-1964], The Pennsylvania State University, pp. 592-595.

access to the archives controlled by the Kremlin in Moscow and in Ukraine? Did Polish historians manage to access the archives in Ukraine? Which actors and research centers were active and decisive in the Polish-Soviet Ukrainian research network?

Accessing Soviet archives

The archival question is at the core of Polish-Soviet Ukrainian relations during the whole post-World War II period. It was the main bone of contention between the PRL and the USSR, and it provoked multiple crises on the highest level.

The partitions of Poland (1772, 1793, 1795) caused unprecedented fragmentation and transfers of Polish archives. Once Poland (The Second Polish Republic, II Rzeczypospolita) got its independence in 1918, it never stopped asking Moscow and the Baltic republics to return “Polish” archives, captured in the former Polish lands. Among the most demanded were the archives of the so-called Lithuanian Metrica, the Crown Archives, Wilno and Vitebsk archives, as well as Polish archives in Lviv.

The question of the archives left in the newly created states and annexed lands after the First World War had been a bone of contention over many long years. The former states of the Habsburg Empire had signed agreements, which included the issue of the restitution of archives. However, the situation of the restoration of national cultural patrimony between Poland, Russia and Ukraine was the most complex. The Treaty of Riga, signed in 1921, settled the question of archives, but not its execution. Its execution was extremely difficult, time-consuming, and incomplete. The Commission worked for 13 years (1921-34) and only partially managed to settle the submitted claims.⁵

The Soviet authority established harsh rules to regulate access to Soviet archives. Priority was given to communist or to “loyal” histori-

⁵ There were four general principles on which the restoration of Polish cultural heritage was based: Repatriation of cultural treasures and archives based on the principles of territoriality and nationality; Reciprocity of repatriation; No distinction between private and public property; Protection of the integrity of “systematic, scientifically prepared and complete collections” of universal importance. Jakubowski, Andrzej, 2015. *State Succession in Cultural Property*. Oxford: Oxford University Press, pp. 81–82, available at:

<http://www.oxfordscholarship.com/view/10.1093/acprof:oso/9780198738060.001.0001/acprof-9780198738060> [Accessed 10 June 2020]

ans.⁶ As for the chronological framework, Polish scholars were permitted to access documents of the nineteenth and less often the first half of the twentieth century. As a rule, Soviet authorities gave access to the main archives, located in Moscow and were very reluctant to give access to the regional archives in Soviet Belarus, Lithuania, and Ukraine.

The whole system of control over the archives was overcomplicated and strictly regulated. The Central Committee itself controlled the work of the Soviet archives, as well as the supervision and approval of the publications of archival collections. Officially, it was the Central Archives Office, attached to the Ministry of Interior of the USSR (MVD), who granted access to the archives to foreigners, but in reality the whole process was controlled and decided by many intermediate institutions: by the Department of Science at the CC, the Propaganda and Agitation Department, the Academy of Science (often at the lowest decisional level), the Ministry of Education, VOKS, as well as the Ideological Department of the CPSU Central Committee. This complex structure was duplicated in each Soviet republic: in Soviet Ukraine, the Ukrainian Central Archives Office, attached to the Ukrainian Ministry of Interior, supervised access to the Ukrainian archives with the same intermediate institutions involved.

To access the Soviet archives, all citizens had to procure special permission from the above-mentioned Main Office of Archives of the MVD, as well as permission (it was called the research plan) from the hosting research institute. As a private person it was impossible to access Soviet archives. The whole system was created in order to allow only scholars hosted by state-sponsored institutions to access the archives. Foreign scholars were therefore bound to the hosting institution and to local historians, called “scientific tutors” to access the archives.⁷ As Robert Byrnes wrote about American scholars coming to the Soviet Union:

⁶ See the whole discussion to select loyal Polish historians in Горизонтов, Леонид, 1993. "Методологический переворот" в польской историографии на рубеже 1940-1950х годов и советские историки ["Methodological turn" in Polish historiography on the turn of the 1940-1950s], *Славяноведение*, 6, p. 57.

⁷ Many scholars describe their experience of accessing Soviet archives and the obstacles encountered. Particularly vivid is the experience of Wiktoria Sliwowska to access Soviet archives in Sliwowska, Wiktoria, and Sliwowski René, 2008. *Rosja - nasza miłość* [Russia, our love]. Warszawa. Wydawnictwo Iskry, pp. 198-203; and by Daniel Beauvois in Beauvois, Daniel, 2015. "Mes Pierres De Lune: Essai D'autobiographie Professionnelle ». *Organon*, 46, Warszawa: Instytut Historii Nauki Polskiej Akademii Nauk, pp. 82-83; Byrnes, Robert F., 1977. *Soviet-American academic exchanges, 1958-1975*, Bloomington : Indiana University Press, pp. 176-200.

“Each has had to submit a detailed study plan to the Soviet professor to whom he had been assigned. Above all, he has had to obtain the Soviet professor's support to gain access to libraries and archives and permission to travel, even for study-related purposes. This has often been difficult and sometimes impossible to obtain, even for the most innocent topics. Some Soviet professors are reluctant to recommend or support access to archives, which were under the administration of the Ministry of the Interior from 1939 until 1960 and which, in their minds, remain a province of the KGB.⁸

During Stalin's rule, Soviet archives were carefully sealed, with exceptions only for some loyal communist historians. Only after Stalin's death, was the process of partial sharing and copying of Soviet archives related to Russia / Soviet relations with the countries of the socialist camp initiated. The first to access Soviet archives were scholars from Poland, East Germany, Romania, Czechoslovakia and Hungary. However, the decision to allow access to Soviet archives was granted with restrictions. The Kremlin banned any archival documents which could depict tsarist Russia's policy towards these countries and nations negatively, as well as documents that could cast doubt on the "friendly" policy of Russia or the Soviet Union.⁹

As Robert Byrnes rightly mentioned, the Soviet government effectively denied admission to nominees who wished to study subjects it considered politically sensitive: modern history and politics; Russian and Soviet foreign policy and Russia's relations with other states, even in the nineteenth century; the Soviet economy; various religious sects, even long before 1917; and relations between Russians and Poles or between Russians and any national minority.¹⁰ Moreover, any denied access triggered other refusals.¹¹

⁸ The Ministry does grant one important special privilege: it allows young American scholars in the Lenin library in Moscow to use Reading Room Number 1, which is reserved for senior scholars and is more quiet, comfortable, and efficient than the other reading rooms. Byrnes, *Soviet-American academic exchanges*, 168.

⁹ See more in Szumski, Jan, 2015. “Moskiewskie kulisy edycji źródeł do historii powstania styczniowego. Z dziejów polsko-sowieckich stosunków naukowych w latach 50.-60. XX wieku” [The backstage of the sources editions of the history of the January Uprising in Moscow. From the history of Polish-Soviet scientific relations in the 1950s-60s.], *Klio Polska*, vol. 7, p. 199.

¹⁰ As he mentions, for example, no American was admitted to study the organization and operation of the Soviet central government, the Soviet Communist Party, or relations between the government and the Party. The Ministry denied an application to study the international communist youth organization from 1919 to 1943 because it was

As for archives stored in Soviet Ukraine, mainly the former Polish archives in Lviv, the situation was complicated because of the complexity of the centralized bureaucratic system, as well as because of the political control over Soviet republics. In the highly centralized and bureaucratic pyramid of the Soviet Union, all academic collaboration projects followed the same schema: the top (Moscow) - down (Soviet republics) approach. It was doubled by the strict regulation of foreign visitors to Ukraine. Moscow restricted as much as possible foreigners' research trips to Soviet republics. All foreign scholars complained about it, including the Polish embassy in Moscow, who bitterly noted that all requests addressed to Ukrainian institutions for direct academic cooperation went without reply,¹² in spite of the fact that "direct correspondence" between Polish and Ukrainian institutions was proudly allowed again in 1959.¹³ Participants of IREX exchange programs also complained that all American, as well as British and German, participants were also limited to Moscow and Leningrad for the whole period starting from the late 1950s (Byrnes, 1977, p. 171).

Despite these difficulties, for Polish historians, the Ukrainian archives and particularly the Lviv archives were of special interest. Many lobbied it intensively. Moreover, Polish scholars could only use the „officially sponsored academic exchange” agreements to come to work in Ukrainian archives.

a "non-state organization." It rejected the various applications to study Russian foreign policy in the nineteenth century because these involved "relations with other countries." In 1964 it informed an American who wished to study "differential land rent and related questions of price formation in the collective farm sector" that he could not study in the Soviet Union and instead "should read carefully the speeches of Premier Khrushchev in order to understand differential rent." Between 1958 and 1969 five of the twelve Americans who wished to study the Soviet economy were denied admission; this particularly annoyed the Committee, which approved access to all twenty-six Soviet economists who were interested in similar subjects in the United States. Byrnes, *Soviet-American academic exchanges*, 161.

¹¹ Byrnes, *Soviet-American academic exchanges*, 176; Beauvois « Mes Pierres De Lune: Essai D'autobiographie Professionnelle », 82-83; Sliwowska and Sliwowski, *Rosjanasza miłość*, 198-203.

¹² Archiwum AMSZ [the Archive of the Ministry of Foreign Affairs, Poland], sygn. 1476 „Umowy Kulturalne z ZSRR- plany współpracy kulturalnej i nakowej między PRL a ZSRR na lata 1958-1959 (roczne), f. „Uwagi realizacji planu współpracy kulturalnej na 1958r w dziedzinie szkolnictwa wyższego oraz propozycje do planu na 1959 r. », p. 5.

¹³ Archiwum AMSZ, sygn. 1476, p.1.

Often, different excuses were submitted at the last minute to refuse access to Ukrainian archives. As Robert Byrnes (1977, p. 171) mentions for American scholars:

“For 1975-76 it placed historians and political scientists interested in subjects such as nationalism in Galicia which previously would have received no consideration. However, it did not grant access to essential archival materials. Moreover, a young American scholar on his arrival in August 1975 learned that he had been assigned to Leningrad, not to Lvov, for which the Ministry had assured IREX he would be placed”.

How Poles lobbied for access to Soviet archives

Among all scholars, Polish communist historians were the first and the most privileged ones to be given access to Soviet archives among all scholars from people's democracies. In 1947-1949 there was the Polish Commission of the Party History in Moscow, also known as the PPR / PZPR Historical Committee, who obtained permission to consult and to copy some archival documents related to the history of the Polish communist party.¹⁴ The Commission published archival documents about the Polish communist party and about the history of the Polish workers' movement, officially allowed research topics, which was an exceptional case.

For all others, Soviet archives were closed for all until Stalin's death. Only in 1956 did a relative opening of Soviet archives occur in Moscow during Khrushchev's Thaw.¹⁵ The Polish and Soviet Academies

¹⁴ See more in Rutkowski, Tadeusz Paweł, 2007. *Nauki Historyczne w Polsce 1944-1970: Zagadnienia Polityczne i Organizacyjne* [Historical Sciences in Poland 1944-1970: Political and Organizational Issues], Warszawa: Wydawn. Uniwersytetu Warszawskiego; Szumski, 'Moskiewskie kulisy edycji źródeł do historii powstania styczniowego', 199.

¹⁵ Many scholars testify about this Thaw's brief opening: Baron, Samuel Haskell and Frierson, Cathy, 2003. *Adventures in Russian Historical Research: Reminiscences of American Scholars from the Cold War to the Present*. Armonk (N.Y.): M.E. Sharpe; Byrnes, *Soviet-American academic exchanges*; Fitzpatrick, Sheila. 2015. *A Spy in the Archives a Memoir of Cold War Russia*. London: Tauris; Sliwowska and Sliwowski, *Rosja nasza miłość*; Sliwowska, Wiktoria, and Sliwowski René, 2003, "Полвека у Кругах Российской Культуры и Науки (Несколько Заметок Личного Свойства)" [Half a century at the Russian culture and science network (a few personal comments)] in Волков, Владимир (ed.), *Российско-Польские Научные Связи в XIX-XX Ве*

of Sciences signed an agreement of academic exchange in 1957, which unlocked the whole situation. This agreement was not only the “royal” privileged opportunity, but the easiest way to access Soviet archives.

Immediately, Polish scholars started talking about Soviet archives and how to force the Soviet Union to cooperate. When the Polish embassy in Moscow prepared a draft of the new agreement of scientific and cultural cooperation between the PRL and the Soviet Union in 1958, it consulted involved Polish counterparts. The representative of the Polish Academy of Science (PAN) noted that

*“I do not have any special objections to the draft agreement. What is **important** to the Polish Academy of Science is to cooperate with Ukrainian and Lithuanian Academies of Science in order to get an access to archives in Kyiv, Vilnius and Lviv. Therefore, the PAN would like to sign separate agreements with the Ukrainian and Lithuanian Academies of Science”¹⁶.*

Any occasion was suitable to revive discussions about archives in the Soviet Union.¹⁷ Highly-placed Polish administrative and political leaders intensively lobbied the question of the access to Soviet archives. The issue of access to the archives was probably one of the rare issues which united all Polish scholars: communists, opponents, historians and emigrants. Soviet authorities were quite embarrassed with the issue of granting access to Poles, as it was a delicate political issue, and everything was done in order to discourage scholars.

[Russian-Polish Scientific Relations in the 19th-20th centuries, Москва: Рос. акад. наук. Ин-т славяноведения, Комис. историков России и Польши, Индик, 60.

¹⁶ Archiwum AMSZ, sygn. 1476, “Uwagi realizacji planu współpracy kulturalnej na 1958r w dziedzinie szkolnictwa wyższego oraz propozycje do planu na 1959 r», p.5.

¹⁷ To mention only early attempts to lobby the archival question, in 1954 when the Soviet delegation was in Poland, Polish historians immediately started to lobby the issue of the archives. It was done during the delegation of Soviet historians in the session devoted to the 300th anniversary of the Pereyaslav Agreement and during the celebration of the 500th anniversary of the incorporation of Pomerania (Pomeranian Conference) to the Polish state (25–28 October 1954). In February 1955, another delegation was in Moscow in order to discuss the first volume of the *History of Poland* asking Soviet authorities to allow archival queries related to Polish history to be made in the Archives of Ancient Records in Moscow. The Soviet authorities diplomatically refused access. See more Szumski, ‘Moskiewskie kulisy edycji źródeł do historii powstania styczniowego’, note 5, 197.

In 1959 there was even a scandal initiated and supported by the Polish embassy in Moscow about access to the Soviet archives. In May 1959, the Polish embassy sent an official memo complaining about the fact that Polish scholars cannot access the Soviet archives.¹⁸ Soviet authorities replied via the VOKS¹⁹ director Zhukov, who justified the difficulties of accessing Soviet archives by the fact that it was the Ministry of Internal Affairs (MVD) who managed it, as well as by the Soviet system, which was overloaded with applications:

I told you that these difficulties are related to the fact that our archives are overloaded. When the archives were created, it was not planned to host so many scholars from all disciplines and countries. Now the number of Soviet and foreign scholars who want to work in the archive is big. This is why there are inevitable delays. This is the only reason of the difficulties to use Soviet archives²⁰.

The VOKS head in turn blamed Polish scholars, who did not follow Soviet rules, and did not send the official request to the Main Office of Archives via the hosting Soviet institution in advance.²¹ It was a typical excuse of Soviet authorities. However, Polish historians also threatened Soviet authorities with the archival issue. Tadeusz Manteuffel, the director of the Polish Institute of History (IH PAN) many times claimed that

¹⁸ Memo "Concerning the realization of the plan of cultural and scientific cooperation for 1959" together with Tadeusz Daniszewski's report "About the difficulties to access Soviet archives by Polish scholars". Tadeusz Daniszewski was the director of the Polish Institute of Party history at that time. AMSZ Archiwum, Zespół 21 Departament Prasy i Informacji (1946-1963); folder 1476, wiazka 111, Umowy Kulturalne z ZSRR- plany współpracy kulturalne i nakowej między PRL a ZSRR na lata 1958-1959 (rocne), protokoly, notatki, sprawozdanie z realizacji planu za rok 1959.

¹⁹ VOKS (All-Union Society for Cultural Relations with Foreign Countries) was an entity created by the government of the Soviet Union in 1925 to promote international cultural contact between writers, composers, musicians, cinematographers, artists, scientists, educators, and athletes of the USSR with those of other countries. The organization conducted tours and conferences of such cultural workers. VOKS was restructured and renamed in 1958, replaced by a new so-called "friendship organization" known as the "Union of Soviet Societies for Friendship and Cultural Relations with Foreign Countries," which continued to exist until 1992.

²⁰ AMSZ Archiwum, folder 21 Departament Prasy i Informacji (1946-1963), ZSRR, 1476, wiazka 111. p.2

²¹ Ibid, p. 3

the Institute is ready to make joint Polish-Soviet projects only if the Soviet archives are available for Polish scholars.²²

Why did Polish scholars need Soviet archives? They needed them for many reasons, one of which was that the main Polish archive had been destroyed in a fire during the Second World War, so many archives were only available in the Soviet Union. As Wiktoria Sliwowska (2003, p. 227), a Polish historian who worked on the Polish-Soviet publications added, "The publication of archival documents from the archives of the Soviet Union (primarily from Moscow, Leningrad, Kiev and Vilnius) had always been the task that the Polish historians considered as a top priority". Polish scholars had always claimed that real work is possible only using the archives. Soviet historians were often surprised to realize that Polish colleagues refused to accept work in contemporary history based on Party declarations and newspaper articles.²³

The second reason was that Polish historians had a strong tradition of working with archives, as well as publishing collections of archival documents. As Stefan Kieniewicz (1990, p. 123), the editor of the successful Polish-Soviet archival documents said "We write and publish scientific monographs for our own satisfaction, while we publish archival sources for others." Sliwowska (2003, p. 227) adds that "The so-called generalized works ("syntheses" as Poles say), are aging badly, while well-prepared, skillfully selected, and grouped around important topics, archival sources keep their significance and importance, I can say "forever". Polish historians see in the publication of archival documents a kind of mission, as Kieniewicz (1980, p. 265) said: "I have no illusions that my rather abundant scientific output will soon be forgotten. What will survive, if the world avoids disaster, are source publications. Specialists use monographs for some time until they are replaced by newer and better ones, or only more fashionable ones."

Polish scholars also needed archives to base their research upon. To write a dissertation in history without archives is not even a question. Lastly, there was also an issue to save them for posterity, particularly those of the Soviet Union, which had been inaccessible for a long while. As Sliwowska (2003, p. 230) stated when she accessed archives from the

²² Ромек, Збигнев, 2003, «Наука против идеологических догм: сотрудничество польских и советских историков после Второй Мировой войны» [Science against ideological dogmas: cooperation of Polish and Soviet historians after World War II] in Волков, Владимир. *Российско-Польские Научные Связи в XIX-XXвв.*, 189.

²³ Ibid.

XIXth century: “Some archival documents were severely damaged; they were deteriorating before our eyes. Their publication saved a number of important documents from the final loss.”

The adventures of brave Poles in Ukrainian archives

It was already hard to get permission to access archives in Moscow and Leningrad; it was even harder to procure one for Ukrainian archives. However, this did not prevent Polish scholars from trying to get to them at any price. With the beginning of the Thaw, Polish scholars tried to figure out how to get to Ukrainian archives to see what remained and in what condition. Some of these trips looked more like spy trips than is usual for scholarly research. Michał Wąsowicz, the director of the Central Archives of Historical Records in Warsaw,²⁴ and Stefan Rosiak from the National Archive of Lodz, were sent to the USSR in December 1958–beginning of 1959 by the General Office of Polish Archives in order to evaluate the archives of Ukraine, Belarus and Lithuania related to Polish history. However, Soviet authorities carefully blocked such initiatives. The Soviet representative claimed that they did not get permission from the Main Archives Office of the MVD, as they did not apply on time, and so the “Ukrainian and Belarussian archives did not have time to prepare the requests.”²⁵

Soviet authorities really needed time to evaluate the requests in order to check if archival documents could be consulted or not by foreign scholars. The main reason was to verify whether archival documents contained any information that could harm Polish–Soviet relations and could cast any doubt about the “friendly” politics of the Soviet Union (and Russian empire) towards its lands and people. Thus, the excuse of regulations and time delay was used and abused, particularly towards Ukrainian archives, in order to limit as much as possible the entry of Polish scholars.

An illustrative example of the attempt to get to Ukrainian archives is the case of Irena Rychlikowa, a Polish historian from Krakow’s School of Agrarian studies, who petitioned intensively the director of the Polish Institute of History PAN in 1957 about her planned and much-needed research trip to Lviv. In her letter she begs the director to „help me to get

²⁴ In Polish Archiwum Główne Akt Dawnych w Warszawie, AGAD.

²⁵ AMSZ Archiwum, Zespol 21, Umowy Kulturalne z ZSRR- plany współpracy kulturalnej i nakowej między PRL a ZSRR na lata 1958-1959 (rocne), protokoły, notatki, sprawozdanie z realizacji planu za rok 1959, p. 3

to the Josephine records archive in Lviv using the non-hard_currency agreement”²⁶. The financial issue was important, as according to the exchange agreement only officially validated scholars had their stay completely paid by the hosting institution²⁷. Irena implored the director:

*In turn I am ready to provide accommodation and full board in Krakow for any Soviet (or Austrian) researcher for 2 weeks, or to submit to the Director of the Institute of History (or directly to the incoming researcher) the appropriate sum that would allow him to conduct two weeks of research in any city in Poland. I ask the Soviet side for the same conditions for me*²⁸.

It is interesting that Irena in 1957 had already mentioned the possibility to get to archives by non-official opportunities, using a private tourist trip or a family invitation. It shows that Poles knowing the situation had already explored all possible ways to get to archives.

*I cannot arrange this exchange privately, without the Institute's help, because I do not have any relatives or friends in Lviv or the surrounding area. I do not even know whom in the Soviet Union I can contact with my offer. I have no idea if, as a private person, I can ever receive any answer at all*²⁹.

Irena was right to worry, as Soviet scholars were not allowed to manage such deals, and their correspondence was carefully checked by Soviet state. The only possible way to get to the archives in the 1950s-60s was to benefit from the state-sponsored official exchange agreement: “I hope that the Pan Director will help me in arranging a trip to Lviv, I am begging you again and again.”³⁰

²⁶ IH PAN archiwum (Instytut Historii Polskiej Akademii Nauk) [the Archive of the Institute of History of the Polish Academy of Science], sygn.5A/56. Pismo Ireny Rychlikowej do Dyrekcji IH PAN, 24.02.1957, s.72

²⁷ However, many Polish scholars used tourist or private trips to travel to the Soviet Union, it was much used than the official institutional agreement. Most of Polish scholars also prolonged their research trip on “their own” paying by themselves.

²⁸ IH PAN archiwum, sygn.5A/56. Pismo Ireny Rychlikowej do Dyrekcji IH PAN, 24.02.1957, s.72

²⁹ Ibid.

³⁰ Ibid, s.73

Among Polish historians who could benefit from the official exchange agreement was Krzysztof Dunin-Wasowicz (1923-2013), a Polish historian who had twice been to Ukraine, in 1957 and 1964. He left an interesting report about his first stay in Ukraine in 1957. Officially he came to conduct research about Ivan Franko (1856-1916)³¹, a leading Ukrainian writer and activist. However, in reality it was obvious from his report that he came to explore the former Polish archives. Once in Kyiv, he complained that he “had to pay *la visite de courtoisie* to the Institute of Literature and talk with scholars”, while his thoughts were busy with the archives. Once official presentations were accomplished, he rushed immediately to the archives:

*Worked at the Manuscript Library in Kiev. There is the collection and correspondence of Tadeusz Czaski. There is also the library of King Stanislaw Augustus, containing around 18 thousand volumes. V.Olszewicz once noted the possibility of taking back this library in 1931. This action could be taken again today.*³²

It looks as though he took notes of information of archival spisi (inventories), which could be useful for future Polish historians.

*Kiev's Archives also contain an archive of the University of Kiev, on the basis of which a book on the history of Kiev University in 1958 is prepared. Polish students will be included. The archive contains information about Polish families in Ukraine. But this archive is not ordered. However, political affairs and personal files of Polish landlords were taken out of Ukraine during the war most probably to Moscow.*³³

Dunin-Wasowicz on the advice of Kyiv's historians went to Odessa to search for other Polish archives:

³¹ Ivan Franko (1856-1916) was a Ukrainian poet, writer, social and literary critic, journalist, interpreter, economist, political activist, ethnographer, and the author of the first detective novels and modern poetry in the Ukrainian language. He was a political radical, and a founder of the socialist and nationalist movement in western Ukraine.

³² IH PAN archiwum, sygn.5A/56. Krzysztof Dunin-Wasowicz, Sprawozdanie z podróży naukowej do Ukrai. SRR 2.09.-04.10.1957

³³ Ibid.

In Odessa, at the end of the 19th century, there was a big Polish colony that had its own cultural house and its own libraries. It is possible that there are materials in the Linczenski archive, but the archive is not ordered, and at my request the management of the regional archive began to organize it.³⁴

However, the main goal of Dunin-Wasowicz's research trip was the Lviv archives.

*In Lviv I worked in the department of manuscripts of the library, mainly with the archives of Wozniak and Barvinsky. There is a lot of material on Polish-Ukrainian relations, as well as on relations between Poles and Ivan Franko. In *spetzkhran*³⁵ I read forbidden Ukrainian magazines, which we do not have in Poland. After I worked with the Lviv Archive, *Akty Krajowej Komisji do spraw regulacji serwitutow. Flat act: fondy 146, 12 tomow.*³⁶*

It is striking how well-informed Dunin-Wasowicz was about which archives to check and how to find them. As Soviet Ukraine was completely closed even for Poles until 1956, it looks as though he also wanted to check if archives related to Poles and Polish history were available, in what condition, and how to access them. He carefully noted the references of archives' fonds in order to inform other Polish historians which files to order next time. The main problem was the lack of free access to archival inventories for foreigners. In order to know which file to order, foreign scholars had to know in advance in which fond the necessary files are. All Polish historians complained about it³⁷. Here the role of

³⁴ Ibid.

³⁵ A special part of the library which contained literature forbidden by Soviet authorities.

³⁶ IH PAN archiwum, sygn.5A/56. Krzysztof Dunin-Wasowicz, *Sprawozdanie z podróży naukowej do Ukrainy*. SRR 2.09.-04.10.1957

³⁷ For instance, Sliwowska, *Rosja nasza miłość*, 205; Beauvois « Mes pierres de lune : essai d'autobiographie professionnelle », 59; Byrnes, *Soviet-American academic exchanges, 1958-1975*, 178; Śliwowska, *Wiktoria*, 2012. *Historyczne peregrynacje: szkice z dziejów Polaków i Rosjan w XIX wieku* [Historical peregrinations: sketches of the history of Poles and Russians in the XIXth century], Warszawa : Instytut Historii PAN, 218.

local (Russian or Ukrainian) historians was essential, as they knew the inventory and had an easier access to Soviet archives.

Despite such restrictions, difficulties and obstacles, Polish and Ukrainian historians established tight relations and collaborated, sometimes even in informal ways.

Sliwowska needed desperately to get to the Lviv archives for her research, but the city of Lviv and the Lviv archives were forbidden to her as a foreigner. She had a so-called nanny, assigned by the Kyiv's Institute of History, whose ostensible role was to take care of her, while in reality was to monitor her. A Ukrainian historian, Grigoriy Marakhov (1918-1994), was this nanny, an "unpleasant guy, who used his privileged position to boast of his direct access to archives and to blackmail me" remembers Wiktorja Sliwowska³⁸. Soviet archives at this time did not have the *opisy* (archives inventories), so the scholar had to know exactly which file to order.

"It was impossible to know", said Wiktorja (2020), "we depended on local historians to access the archives, who knew very well the archives and could order the files. Without them and good relations with them, our work was impossible". In her quest for the Lviv archives, Moscow historian Vladimir Diakov (1919-1995) contacted Lviv's historian Volodymyr Borys (1914-1985), who in his turn, helped Wiktorja with the Lviv archives. As Wiktorja (2020) said "Pan³⁹ Borys was *nevyizdnyy*⁴⁰, he did not have the right to go abroad, to go anywhere outside the Ukrainian SSR. I also could not meet him, but we corresponded via Diakov. He helped me a lot with the Lviv archives".

Among other persons who helped Polish scholars, Sliwowska (2012, pp. 217-222, 2020) recalls her close friend, a Soviet scholar Dora Kacnelson (1921-2003), who in the Soviet Union dared to break rules and moved around freely. She did not hesitate to be a guide for Polish scholars, including in their quest for Soviet archives:

"I remember as she recalled how she travelled, in secret, with professor Stanislaw Mossakowski (born 1937) to his former property, how they met peasants from his former

³⁸ Wiktorja Sliwowska, interview by Nataliya Borys, Warszawa, 30 January 2020.

³⁹ Pan in Polish means Mister, but rather to emphasize the honorary attitude to the person.

⁴⁰ In Ukrainian context *nevyizdnyy* means that the person does not have the right to go abroad by Soviet authorities. In Soviet Ukraine many had this status: mainly Jews or those originally from Western Ukraine.

estate and spoke to them. Moreover, she dared to go to Lviv, a city forbidden to us, she knew how to sneak into the Lviv archives and the Ossolineum, which she knew by heart. Not only could she access the archives, but she also helped her colleagues with their requests in the Lviv archive. At this time, the opysy were not available for foreigners, but she managed to get them, and gave us the necessary opysy. She was friends with the archives' employees who were, as a rule, of the lowest level of official career, but who were ready to make a service for Dora, including breaking the rules and exposing themselves to possible problems, but they found the necessary archives."

Conclusions

The main motivation for Polish scholars in Polish-Soviet scholarly collaboration was to access their former archives. Soviet archives were the carrot and the stick in relations with Poles: if you behaved well, you could probably get access to archives. In spite of the "good" behavior from "friendly people's democracies", Soviet authorities had never really wanted to share the archives.

Moreover, access to archival collections in the USSR was largely done on the Kremlin's terms, and most of the time documents were provided for research projects related to Polish workers and the communist movement, or to the so-called "national-revolutionary" uprisings. If they wanted to access Soviet archives, Polish scholars had to fit into these topics. However, they were quick to realize how to "make-up" their own topics in order to fit the imposed framework. The main success story was the Polish-Soviet research project of the January uprising of 1863-64,⁴¹ loosely fit in the general framework defined as the XIX century's political upheavals. It was the most researched topic by Polish scholars in the Soviet Union with the publication of more than 24 volumes of the archival documents.

⁴¹ The January Uprising (in Polish Powstanie styczniowe) was an insurrection in Russia's Kingdom of Poland aimed at the restoration of the Polish-Lithuanian Commonwealth. It began on 22 January 1863 and continued until the last insurgents were captured by the Russian forces in 1864. It was the longest-lasting insurgency in post-partition Poland. The conflict engaged all levels of society, and arguably had profound repercussions on contemporary international relations and ultimately provoked a social and ideological paradigm shift in national events that went on to have a decisive influence on the subsequent development of Polish society.

The topic, Polish uprising against the Russian empire, was not politically neutral, as it emphasized the heroic fight of Polish people against Russia (tsarist authorities for sure, but nevertheless the movement was anti-Russian). However, Polish scholars, as Wiktoria Sliwowska (2020) recalls, knew how to make it appear politically neutral and to color it in Soviet-friendly tones:

“In 1963 there was the 100th anniversary of the January Uprising, so this is how the idea of the research dedicated to the January uprising came about. Evidently, and it is obvious from the introduction and of the whole volume, the Uprising was depicted as a national liberation movement and as an example of joint struggle of Polish and Russian “revolutionaries”. It was not exactly the truth. To fit Soviet requirements, the volume also got the proud title “Revolutionary movement”. Many of these titles had only one function: to please Soviets and to continue to work in Soviet archives. This was the rule of the entire period of the PRL.”

The Soviet authorities paid special attention to the publication of archival documents. It was used as one of the important mechanisms of the control of relations with its neighbors, mainly with Poland, whose history had been entangled with the Soviet Union and Russian empire for centuries. Decisions to restrict access to archives for foreign scholars were based on the main concern that the scholar could eventually reveal any slightest doubt about the “non-progressive” politics of Russia, the Russian empire or the USSR towards other countries.⁴² Moreover, all projects regarding publication of archival materials were also subject to supervision and approval by the highest and intermediate control bodies, including the CPSU Central Committee.

Despite the tight control and numerous obstacles, Soviet authorities failed to impose their rules on Polish scholars. Polish scholars, using all possible opportunities, launched joint projects which somehow satisfied all counterparts: Polish historians finally got to the archives, Soviet (mainly Russian) historians could work with Poles on interesting topics, while Soviet authorities nolens volens had a kind of control over the re-

⁴² More in Szumski, Jan, 2019. "The USSR's Politics of History toward the Slavic Countries of the Eastern Bloc: Formal and Institutional Frameworks. 1945-1989", *Kwartalnik Historii Nauki i Techniki*, 4, 74.

bellious Polish historians. Poles and historians from the Institute of Slavic studies in Moscow were the most successful in creating the network. They even set up a kind of mafia network: for long years, they imposed their favored topics of national-liberational uprisings upon others⁴³. Poles required also the publication of archival sources claiming that all research work should be done based only on archival sources, and so they incessantly lobbied for access to Soviet archives.

Soviet historians helped Poles as much as they could. In turn, Poles helped Soviet scholars to work in Polish archives and to get to Polish libraries. Many Soviet scholars in Poland discovered forbidden literature and archives.

Finally, Polish-Soviet cooperation in history produced results quite opposite to Moscow's expectations: instead of the politically suitable history of Polish-Soviet cooperation, the joint projects served as the basis for many studies which suited rather the mainstream Polish historiography: national, patriotic, anti-Soviet, which shaped the historical consciousness of many generations of Poles.

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⁴³ The director of the Polish Institute of History complained about this kind of mafia, who imposed their topics (the Polish Uprisings in the XIX century), while other Polish scholars were rather interested in other research areas, mainly the Polish-Lithuanian Commonwealth. See the letter in IH PAN archiwum sygn.5/95. Dyr. IH PAN prof. T. Manteuffel do prof. Stefana Zolkiewskiego, Sekretarza Wydziału I PAN, 13 August 1963, k. 253; mentioned also in Romek, Zbigniew, 2010. *Cenzura a Nauka Historyczna w Polsce 1944-1970* [Censorship and Historical Science in Poland (1944-1970)], Warszawa: Neriton, 85-86.

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The Role of the *Language Priorities* in Development of Society

Abstract: *The need to comprehend contemporary global problems the mankind is facing poses demands to modern science to expand the range of functions and strengthen interaction between areas of society. The modern anthropocentric scientific paradigm makes a focus on the interdisciplinary research of the civilizational processes of social development, which created the need for a comprehensive study of sociocultural and linguistic processes in their functional interaction during the historical development of society.*

The process of human socialization is, first of all, the mastery of the symbolic cultural code and cultural memory of society, which in modern society is losing its usual monoculturism and is increasingly acquiring a bi- and multicultural character, which poses a pressing multifaceted problem for society - linguistic policy, linguistic consciousness, persona lingua.

The language policy of any particular country or region is dictated by the prevailing socio-political situation in the country and contributes to shaping the fate of this country for it regulates the status of the state language, the language of the press, education, and science.

In each society, certain language priorities are formed, as well as language prohibitions that regulate the life of society, and the formation of the worldview of the participants in society depends on the languages being assimilated. Not surprisingly, the problems of language (with the light hand of the philosopher Ludwig Wittgenstein) have long exceeded philological problems of philological problems.

The language policy of small countries largely depends on foreign policy factors; it is interesting to follow the example of Georgia to trace the change in language priorities in different historical eras (from Arabic, Persian, Greek, Latin, Turkish to Russian, and now to English). The Second World War became an important milestone for Soviet Georgia in language policy: the spiritual unity of all the peoples of the USSR was so intense that the formation of a single supra-ethnic community "Soviet nation" was successfully supported by language policy: having Russian as the second native language. The education system and the press were fully focused on the Russian lan-

guage. The schools taught foreign languages (French, German, English) by choice, but the minimization of hours, the grammatical approach and the lack of language practice allowed only units to learn European languages at the level of free communication.

The 1990s became a period of forced breaking of habitual linguistic priorities for Georgia, free of imperial influence. English has become compulsory subject matter at all stages of the Georgian educational system, Russian is studied only by choice as a second foreign language with a minimum number of hours. The previously banned Turkish language is strengthening its position, especially in Adjara, neighboring Turkey.

Key words: *society development strategies, language policy, Soviet ideology, social and political pre-determination, linguistic priorities/bans.*

Introduction

The need to comprehend modern global problems facing humanity has required modern science to search for life strategies for the development of mankind, science expands the range of functions performed and strengthens relationships with other areas of society. The world scientific community has realized that the search for solutions to global problems (overcoming the environmental crisis, depleting natural resources, preventing thermonuclear war, etc.) requires joint efforts. The events taking place in the modern world related to the coronavirus pandemic are yet another sad confirmation that the solution of universal problems requires the cooperation of all countries and peoples, both in the socio-political and scientific fields, which is associated with a number of problems.

Currently, the focus of the modern anthropocentric scientific paradigm has turned out to be interdisciplinary studies of civilizational processes of the development of society, the need for a comprehensive study of sociocultural and linguistic processes in their functional interaction during the historical development of society has been recognized. First of all, they include the numerous problems of intercultural communication, the national specifics of the linguistic pictures of the world of communicants, the sociolinguistic problems of the linguistic situation in each particular region, and, of course, the role of the system of linguistic priorities in the development of society.

The process of human socialization lies in mastering the symbolic cultural code and cultural memory of society, which in modern society is losing its usual monocultural nature and is gradually becoming multicultural, which poses a pressing multifaceted problem for society - linguistic policy, linguistic consciousness, linguistic personality. The language policy of each particular country or region is determined by the prevailing socio-political situation in the country and largely determines the fate of

this country, for it regulates the status of the state language, the language of the press, the language of instruction, the language of science.

Each society has certain linguistic priorities, as well as linguistic prohibitions that regulate the life of society and directly depend on the geopolitical location and specific socio-political conditions, and the formation of the worldview of participants in society depends on the languages being assimilated. It is not surprising that the problems of language (with a philosopher Ludwig Wittgenstein) have long gone beyond the problems of philological problems.

The history of mankind is rich with examples when the dominant language in the region undergoes drastic changes for various reasons. It is enough to recall the languages of ancient civilization: first, the Greek language, its huge role in the development of the Christian religion, philosophy, science, medicine, and fiction. After the decline of Greek culture, the leading position in intercultural and scientific communication was overtaken by the Latin language, the language of the Catholic religion, and medieval philosophy. Latin was not only the language of the Great Roman Empire in the Mediterranean, it penetrated into the areas conquered by the Romans of the Iberian Peninsula and present southern France. In the East, Arabic became the language of the Muslim religion and culture, which came to be called "Latin of the East." It was the language of science and literature, education and administration. Even today it is an international language, one of the most widely spoken languages in the world both in the number of speakers of it and in the number of countries in which it is used.

The change in linguistic priorities can be traced in the cases of different countries, of particular interest is the change in linguistic policy in multinational empires, the fate of which is directly related to a large number of small states, whose linguistic policy is more dependent on foreign policy factors: the destruction of great empires, changes in colonial policy, world wars, redrawing the political map of the world, etc., is almost always accompanied by a change in language priorities. However, before analyzing the linguistic priorities and prohibitions in Russia and Georgia, it is necessary to study the most important sociolinguistic terms: linguistic policy, linguistic situation, linguistic community and linguistic personality.

**Language policy. Linguistic situation. Linguistic community.
Personal lingua**

The system of linguistic priorities / prohibitions in society is regulated by two types of diverse measures: on the one hand, linguistic policies are part of state policy and implemented through the adoption of certain laws (the State Language Law, the Law on Education, the Press Law, etc.), on the other hand, in a market economy it is carried out indirectly: by demand on the labor market, based on the geo-political characteristics of the region, through the media, etc. Above all though prevails the cultural and historical identity of each individual linguistic community.

According to the definition of Vladimir Ivanovich Belikov and Leonid Petrovich Krysin, “a linguistic community is a collection of people united by common social, economic, political and cultural ties and making direct and indirect contacts with each other and with various social institutions in everyday life using one language or different languages common in this totality”(Belikov, Krysin 2001,11).

That is, the linguistic community, especially in the context of mass migrations in the 20th-21st centuries, is not linguistically homogeneous. On the contrary, the processes of globalization, the creation of the European Union, a common educational space, the outcomes of the World War II, the collapse of the Soviet Union, etc., stimulated the heterogeneity of existing language communities. Therefore, the language policy of states should be very thoughtful and oriented towards future development in the prevailing socio-political conditions. The change in the socio-political formation, the loss or acquisition of independence, the political orientation of the newly formed state association - all this determines the dynamism of the language policy of the state.

Language policy is part of the state's national policy and is a combination of a number of government measures that somehow regulate language prohibitions and priorities at this stage of the development of society. For example, as one of the fifteen Union republics, Georgia pursued a language policy aimed at strengthening state Georgian language and every possible strengthening of the position of the so-called “second native” Russian language, which served as an interethnic and intercultural community and oneself. After gaining independence in 1991, the language policy of Georgia is again heading for strengthening the state Georgian language, for supporting the languages of national minorities living in Georgia, and for every possible strengthening of the position of

the English language as the dominant language of intercultural communication in the modern world.

According to the thoughtful remark of Vladimir Mikhailovich Alpatov, “the influence of society on the language can be spontaneous and consciously regulated, socially determined. To one degree or another, all changes in the language are caused by the needs of society and serve to satisfy it...” (Alpatov 2005, 331). Under the spontaneous influence of society, the author means the implementation of language policy through the “economic turnover”, market development. For example, proximity to Turkey and numerous Turkish-Georgian relations led to a special interest in the Turkish language in the Adjara region of Georgia, the high motivation in learning the Turkish language was due to the possibility of getting well-paid jobs in Turkish companies.

Alpatov considers language policy in the modern world as based on the interaction of two natural, but opposing, needs. “The need for identity consists in the desire (conscious or unconscious) to use, in any communication situation, “one's own” language, which was naturally acquired in the first years of life. The need for mutual understanding lies in the fact that each of the participants in the communication situation wants to communicate without interference with their interlocutors, regardless of their native language. In most states, both the conscious language policy of the authorities and the spontaneous policy through the “economic turnover” is primarily aimed at supporting the need for mutual understanding” (Alpatov 2013, 8).

The language situation is a direct result of state and language policies. Language is a sociocultural phenomenon. All changes taking place in this community (political, social, economic, cultural), determine the parameters of the emerging language situation, which has a variable character. So, as a result of social upheavals and worsening living conditions in Georgia in the 1990s, there was an intensive outflow of several layers of the population (Jews, Greeks, Russians left), young Georgians who went abroad to study did not return to their homeland. Social processes “priorities/prohibitions” were added to these processes: English has become an obligatory language in all educational institutions, and Russian has become the second foreign language of choice, with a further restriction of its functions.

The language policy of the state (both targeted and spontaneous) and the emerging language situation form a new type of language personality. The theory of linguistic personality was developed by Yuri Ni-

kolayevich Karaulov who represented it in the form of a three-level structure:

- 1) the verbal/semantic level means standard mastering of the natural language by the carrier;
- 2) the cognitive level is represented by such units as concepts, ideas, developing in each linguistic individuality into a more or less ordered, more or less systematic “picture of the world”, reflecting a hierarchy of values;
- 3) the pragmatic level includes goals, motives, interests, attitudes and intentions. This level provides in the analysis of the linguistic personality a consistent and conditional transition from assessments of its speech activity to the understanding of real activity in the world” (Karaulov 2002, 5).

Moreover, the author duly notes that the concept of a three-level device of a linguistic personality in a certain way correlates with three types of communicative needs (contact-setting, informational and influencing) and three sides of the communication process (communicative, interactive and perceptive), emphasizing that we are talking about communicative and occupational needs of the individual (Karaulov 2002, 214-215).

An interesting approach to the study of linguistic personality was taken by Yuri Evgenievich Prokhorov who analyzes the pragmatic level of the linguistic personality and considers the nationally determined value characteristics of the pragmatic context to be an important vector of the pragmatic level (Prokhorov 2004, 113).

Any linguistic personality is a member of social structures, therefore, a change in the social structure of society leads to changes in the linguistic personality, which is interesting to trace by the example of Georgia.

Language Policy in the Russian Empire and USSR in the Caucasus

The language policy pursued in the Caucasus was closely connected with the Russian Empire, then with the Soviet Union, for a number of historical reasons. Therefore it is reasonable to start changing the language priorities and analyzing their role in the development of Georgia by highlighting the key points of the language policy of these countries.

In the late 19th and early 20th centuries the Caucasus represented a colorful picture in terms of linguistic situation: against the backdrop of increasing migration processes (both voluntary and violent), a very strict

language policy of tsarist Russia was carried out in relation to the languages of Caucasian nationalities - a policy of complete Russification. In the 19th century Georgia, the Georgian language had almost no official use, because all administrative clerical work, court cases, and training took place exclusively in Russian, because it is the language that largely determines the formation of the personality, the process of its socialization. Even the patriarchate of the Georgian Orthodox Church was liquidated.

One of the first documents of the Soviet government directly related to national languages was the "Declaration of the Rights of the Peoples of Russia", proclaiming "the free development of national minorities and ethnographic groups", "the right of the peoples of Russia to free self-determination, up to the secession and formation of an independent state"; all national and religious privileges and restrictions were abrogated. However, as Belikov and Krysin note, the "Declaration of the Rights of the Working and Exploited People" adopted at the Third All-Russian Congress of Soviets essentially recognized the proletariat and the peasantry as subjects of national relations, and not national groups as a whole (Belikov and Krysin 2001, 272).

The foundations of the national policy of a multinational socialist state, striving for the formation of "national in form, socialist in content" cultures, were laid in 1922, the subsequent fate of peoples and their languages depended largely on the presence and level of autonomy. In the North Caucasus, more than 50 indigenous languages belonging to various linguistic families and groups of the Iberian-Caucasian, Indo-European and Altai are represented. Many of them did not have a written language, so the main direction of language policy in the North Caucasus in the 1920s-1930s was the creation of written languages for previously unwritten languages, the organization of teaching in national schools and universities, the publication of national literature, and the development of periodicals. All this corresponded to the ideological tasks of the Soviet state, which were formulated by Joseph Vissarionovich Stalin: "... for the Soviet country to become native for the peasantry of other nations, it is necessary for it to be understandable for it, for it to function in its native language, for schools and government bodies to be built from local people who know the language, mores, customs, and everyday life" (Stalin 1951, 241).

The situation in the Caucasus was different. In 1922, the so called Transcaucasian Soviet Federative Socialist Republic (ZSFSR) was introduced into the Soviet Union which included three union republics: Azer-

baijan, Armenia and Georgia. These republics were in a better position, primarily because the Armenian and Georgian languages had an ancient script and rich cultural heritage.

In Azerbaijan, as in other Muslim countries, they used Arabic script, which caused a number of problems. Back in 1857, Mirza Fatali Akhundov developed a draft reform of the Arabic alphabet based on the Latin alphabet. At the beginning of the 20th century, the issue of switching to the Latin alphabet was repeatedly raised by the Azerbaijani intelligentsia. In 1922, the Latin alphabet was approved in Azerbaijan, which was first used in parallel with the Arabic, and since 1925 it became mandatory. Since January 1929, office work, school and printing in Azerbaijan were completely translated into the new alphabet (Isaev 1979, 72).

Latin was not chosen by chance: Arabic was a sacred language, the language of the Koran, the Cyrillic alphabet underlying the Russian graphic personified the policy of the imperial empire, while the Latin alphabet was perceived by the Bolsheviks as international, the assimilation of which should have helped the cause of the “world revolution”. The reform of the written language in the Caucasus was led by a Caucasian expert N.F. Yakovlev, and in language construction a kind of social competition began on the issue of early Latinization. Even attempts have been made to Latinize the Georgian language, which will be discussed below. For ideological reasons, the Latinization of all the languages of the USSR was conceived, since the Russian civil alphabet was perceived as “a relic of the class graphics of the 18th – 19th centuries. Russian feudal landlords and the bourgeoisie ... It still connects the population reading in Russian with the national bourgeois traditions of the Russian pre-revolutionary culture” (Culture and Writing of the East 1930, 214).

These projects have not been implemented. However, we share Belikov and Krysin’s view who believed that despite the proclamation of the national interests of individual peoples and ethnic groups, “the actual implementation of constitutional rights did not always correspond to declarations,” although it is necessary to recognize that in the field of national-language construction, requiring huge material investments, a lot has been done: dozens of written languages have been developed, many languages have been used for the first time in scientific fields, and even more so in socio-political field and office work, developed new textbooks, teachers trained personnel (Belikov, Krysin 2001, 281).

The national and linguistic policy of the young Soviet state had a very ambitious goal: the creation of a new supra-ethnic community of Soviet people who spoke one common language, common culture and

communist ideology. With all the above advantages of language construction of the 1920s and 1930s, the purpose of the party apparatus was not the development of national languages (this was an intermediate stage), but the spread of a new ideology. Moreover, the party leadership of the Bolsheviks went towards this goal in two different ways:

1) The destruction of the pre-revolutionary intelligentsia, for which ethnic language and culture had a high spiritual value, through mass repression.

2) The education of a new national intelligentsia, necessary for the functioning of the party-state apparatus in the Union republics, for further national-cultural construction and the creation of a linguistic identity - HOMO SOVIETICUS.

In 1930, at the XVI Congress of the Congress of the Russian Communist Party (Bolsheviks), Stalin clearly formulated the most important task of national policy: "... The flowering of cultures, national in form and socialist in content, in conditions of the dictatorship of the proletariat in one country to merge them into one common socialist (both in form and content) culture with one common language when the proletariat will triumph throughout the world" (Stalin 1951, 369).

However, as Magomet Isaev notes, "the victory of the world revolution was postponed, and the objective interests of the state required knowledge of the Russian language from all its citizens (Isaev 1979: 260). In the mid-30s, to facilitate the study of the Russian language, Russian alphabet was being used as a tool. By the beginning of World War II, there was a massive transition of the languages of the peoples of the USSR to Cyrillic alphabet with some exceptions (for example: Armenian, Georgian). The Russian language became compulsory for study in schools of national republics and regions (see the resolution of the Central Committee of the Russian Communist Party of Bolsheviks and the Council of People's Commissars from March 13, 1938).

Demagogues-ideologists who only recently were claiming that the Cyrillic alphabet is a bourgeois heritage, and the Latin alphabet is an international alphabet used to contribute to the global revolution, began to assert that "Latinized alphabets are no longer able to ensure further cultural growth of the peoples of the USSR ... Transition to a new alphabet, based on the Russian writing is met by the peoples of the USSR as a celebration of socialist culture" (Small Soviet Encyclopedia 1941, 288).

On the eve of the Second World War, and later in the process of the Great Patriotic War, the Soviet Union carried out mass deportations of "unwanted" ethnic minorities, which led to their quantitative reduction

and change in the linguistic situation. Obligatory migration was forced to many minorities, such as: people from Caucasus, like Karachais, Balkars, Chechens, Ingush, Meskhetian Turks, Kurds, Khemshins (Armenian-speaking Muslims), Greeks, Azeries. Without any trial or investigation, solely based on their nationality, people were loaded onto freight cars and sent as whole families to Siberia, Kazakhstan, Altai, and the Urals, most often they were settled in terrible conditions in which only the strongest survived. Many died along the way. In some cases, deportation of national minorities was carried out domestically, for instance in 1944, Kurdish and Azeri families living in Tbilisi were evicted and resettled inside the Georgian Socialist Republic to Tsalka, Borchali and Karayaz districts. From the border regions of Georgia, Laz, Meskhetians, Khemshins were evicted to Central Asia in the beginning of winter. According to Pavel Polyan, due to the difficult three-week relocation, poor living conditions, lack of water and the epidemic of typhus, according to official data, the mortality among migrants reached 11.8% (Polian <http://old.memo.ru/history/deport/polyan2.htm>).

The war clearly demonstrated the need for knowledge of one common language, it is not surprising that the role of the Russian language was strengthened in all areas of life in a huge multinational country. Moreover, the role of the Russian language has strengthened internationally: in 1945, Russian became one of the six international languages in the organization of United Nations; in 1955, the USSR initiated the creation of the Warsaw Pact, in which it played a leading role, and the Russian language was studied in Bulgaria, Romania, Czechoslovakia, Hungary and other countries of the socialist bloc. As a result, Russification of education intensified in the Soviet Union.

By 1975, in many republics, the number of Russian schools exceeded the number of national schools; in official use, the Russian language prevailed everywhere. In most union republics, the process of replacing the national languages with Russian was in full swing, but in Georgia a slightly different linguistic situation has developed.

Dynamic of Linguistic Priorities in Georgia and its Role in Development of Science

The linguistic policy of small states is more dependent on foreign policy factors; it is interesting to follow the example of Georgia to trace the changes in linguistic priorities throughout history (from Arabic, Persian, Greek, Latin, Turkish to Russian, and now to English language).

The revolutionary events of 1917 destroyed the Russian Empire, the Transcaucasian Federation collapsed and thanks to the efforts of the Social Democratic Party of Georgia on May 26, 1918, the Georgian Democratic Republic was proclaimed. But due to the difficult external political situation, as a result of the Bolsheviks victory and the Sovietization of Georgia in the spring of 1921, the Democratic Republic was liquidated and the Soviet Socialist Republic of Georgia was declared, which since 1922 was part of the Transcaucasian Socialist Federative Soviet Republic, together with its neighboring countries of Azerbaijan and Armenia.

By this time, linguistic hierarchies were firmly established in Georgia: due to the tough, long lasting russification policy of the Tsarist regime, the Russian language prevailed in the official circles, but thanks to the active work of the Georgian *Samotsianelebi* (Ilia Chavchavadze, Akaki Tsereteli, Iakob Gogebashvili, etc.), the prestige of the national, titular language - Georgian - was very high. From the second half of the 19th century, more and more Georgian schools are being established, where teaching is conducted in Georgian. In 1918, the first Georgian university is opened in the city of Tbilisi (Tbilisi State University named after Ivane Javakhishvili).

Sovietization of Georgia opens a new page in the history of the country's linguistic priorities, it can be briefly described as a constant (hidden or open) struggle for the preservation of the Georgian language, which is a national treasure. Ilia Chavchavadze called on his compatriots to carefully preserve the three greatest treasures passed by the ancestors: *motherland, language, religion* (Chavchavadze 1927, 156).

As mentioned above, in March 1922, Georgia, along with Armenia and Azerbaijan, was included in the Transcaucasian Socialist Federative Soviet Republic and the communist parties of these countries were ruled by the Transcaucasian Bureau of the Central Committee of the Russian Communist Party (Bolsheviks), Headed by Sergo Ordzhonikize. In October 1922, the Georgian Bolsheviks (B. Mdivani, A. Kobaxize and others) tried to defend the right to independence of Georgia from Transcaucasia. A scandal erupted, Georgian leaders resigned. Stalin and Dzerzhinsky were supporting Sergo Ordzhonikize and the Transcaucasian republic lasted until 1936.

While in the 1920s the Soviet republics were overwhelmed by the general "Latinization", it did not influence the Georgian and Armenian languages, which have their own writings. Although there have been the attempts of "Latinization", they have been limited to certain projects and

do not go beyond those projects. On the contrary, the role of the titular Georgian language has intensified.

The 1930s were very difficult for the Georgian intellectuals: the numerous victims of the Great Terror, the forcible deportation of certain national groups both outside the republic and within its borders, and a difficult economic situation. Bilingualism is becoming the norm: official relations within the Transcaucasian Federation, with other republics of the Union and the center, Moscow, required the training of national staff fluent in Russian.

The Second World War became an important milestone for Soviet Georgia in the sense of linguistic policy: the spiritual unity of all the peoples of the USSR was so high that the formation of a single above-ethnic community "Soviet people" was successfully supported by linguistic policy - Russian was to become the "second native language" for all nationalities within Soviet Union. The educational system and the press were fully focused on the Russian language. The schools taught foreign languages (French, German, English) by choice, but the minimization of hours, the grammatical approach to studying them and the lack of practice allowed only a few to learn European languages at the level of free communication. Everyday bilingualism has become the norm of communication.

As for the development of science and culture, after the Second World War, the Russian language became the language of science for all republics within Union: it was in Russian that Georgian scientists (with rare exceptions) got familiar with the latest achievements in various fields of scientific community. In the context of the confrontation between the socialist and capitalist camps, the escalating Cold War, initiated not only the arms race, but a real competition in the field of the latest scientific developments that could give an advantage to the ideological inspirers of the confrontation - the USSR and the USA. It is not surprising that during this period the Russian translation school was considered one of the best in the world, for not only classics were translated into Russian, but also all scientific materials in physics, chemistry, mathematics, etc. Textbooks for secondary schools and higher educational institutions developed in Russian, translated into Georgian for the teaching of these sciences at national universities. This practice continued until the collapse of the Soviet Union.

Despite universal bilingualism, a lot has been done in the republic for the development of the Georgian language in the fields of culture, education, science, and publishing. Russian was the language of inter-

ethnic and international communication, Georgian was always perceived as the national language, the language of Georgian culture, passed to us by our ancestors. 1978 was a real test for the Georgian intellectuals and students. In 1977, the new Constitution of the USSR was adopted and the Union republics began to prepare new drafts of the constitutions. In the Georgian newspaper *Zarya Vostoka*, published in Russian, article 75 of the draft constitution of the Georgian SSR was published, according to which the status of the national language was assigned to the Russian language. This caused mass unrest and demonstrations in Tbilisi and other cities of Georgia on April 14. As a result, a version of the Constitution was approved, according to which the Georgian language was declared the only state language, and on April 14 (initially unofficially, and officially in free Georgia) it became the Day of the mother tongue.

The 1990s became a period of forced breaking of habitual linguistic priorities for Georgia, free of imperial influence. A sharp change in the socio-political system after the collapse of the Soviet Union, the emergence of serious ethnic conflicts in Abkhazia and South Ossetia, the outflow of the Russian-speaking population, a large number of migrants and emigrants - all these circumstances greatly changed the linguistic situation in Georgia. Being an integral part of the foreign policy of independent Georgia, linguistic policy has changed the existing priorities. English language has become a compulsory subject at all stages of the Georgian educational system; Russian is currently only studied as a second foreign language with a minimum of study hours. The previously banned Turkish language is strengthening its position, especially in Ajara, neighboring Turkey, since, due to the large number of Turkish companies, there is strong motivation for learning this language. The widespread dominance of the English language is the objectivity of the present, but it should be noted that the change in linguistic priorities was accompanied by an “unofficial ban” on the use of the Russian language.

The change in the linguistic situation throughout the country could not but find a response in the scientific field. Just to name the works of a sociolinguistic nature of such famous scientists as Tamaz Gamkrelize, Giorgi Lebanize, Nodar Ladaria, Mariam Gvenc‘aze, David Goc‘irize, Salome Omiaze and others. From the linguistic perspective, the real struggle for the scientists started with the majority of Georgian scientists who were fluent in native and Russian languages, and the younger generation, educated in Western countries and fluent in English but at the same time lacking scientific potential and research experience.

Conclusion

Language and science are closely related sociocultural phenomena that appear and develop in society, and are a direct response to the needs of society, which, in return, affect the development of culture and society.

Language policy, language situation, language consciousness, language personality are closely related sociolinguistic problems. The language policy of each particular country or region is determined by the prevailing socio-political situation in the country and in many respects determines the fate of this country, for it regulates the status of the state language, the language of the press, the language of instruction, the language of science.

Each society has certain linguistic priorities, as well as linguistic prohibitions that regulate the life of society and directly depend on the geopolitical location and specific socio-political conditions, and the formation of the worldview of the participants in society depends on the assimilated languages.

The national-language policy of the Soviet Union was aimed at creating a new superethnic community of Soviet people who shared one common language, common culture and communist ideology, which was achieved in two ways: the destruction of pre-revolutionary national intelligentsia, through mass repression (the period of red and great terror) and the upbringing of a new the national intelligentsia necessary for the functioning of the party-state apparatus in the Union republics and the creation of a new linguistic identity - HOMO SOVIETICUS.

The analysis of the linguistic situation in Georgia demonstrates the transition from monolingualism to bilingualism and from bilingualism to polilingualism, at the same time demonstrating that the changes in linguistic priorities correspond to the changes in linguistic situation. The long period of bilingualism both in the Russian Empire and in the Soviet Union was characterized by a constant (hidden or open) struggle of preserving the Georgian language, which represents a national treasure.

After gaining independence in 1991, the linguistic policy of Georgia is again heading towards strengthening the national Georgian language, supporting the languages of national minorities living in Georgia, and at every possible step strengthening of the position of the English language as the dominant language of intercultural communication in the modern world, facilitating the exchange of knowledge and the development of science in the context of globalization.

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Opportunities for an Academic Career of Women Scientists at the Bulgarian Academy of Sciences (mid. 1940s-1980's)

Abstract: *The object of the paper is the development of Bulgarian science during the totalitarian period (1945-1989), but its subject is the scientific career of the habilitated women, working in the Bulgarian Academy of Sciences (BAS) – the largest scientific organization in the country at that time. The aim is to explore the opportunities for vertical social (scientific) mobility and the existence of a “glass ceiling” for women’s scientific careers at the BAS. The research uses the social history approach, creating a collective portrait and identifying major trends in the study period, using historical analysis of archival and published documents and content analysis of a prosopographic database containing biographies of habilitated women from the institutes and the laboratories of the BAS.*

Key words: *career growth; women scientists; Bulgarian Academy of Sciences; communism.*

Introduction

The object of the paper is the development of Bulgarian science during the totalitarian period (1945-1989), but its subject is the scientific career of the habilitated women, working in the Bulgarian Academy of Sciences (BAS) – the largest scientific organization in the country at that time. The aim is to explore the opportunities for vertical social (scientific) mobility and the existence of a “glass ceiling” for women’s scientific careers at the BAS. The research uses the social history approach, creating a collective portrait and identifying major trends in the study period, using historical analysis of archival and published documents and

content analysis of a prosopographic database containing biographies of habilitated women from the institutes and the laboratories of the BAS.

Along with the aim to trace a number of social mechanisms for “inclusion” or “exclusion” in/from science (ethnic, religious and social background, mixed marriages, family and kinship networks, etc.), the study explores more general issues such as: the link between science, social engineering and political change during the Cold War, foreign cultural influences resulting from training and postdoctoral studies, the “empowerment” and contribution of women to certain sciences, fields and institutes, the formation of the so-called female “reputation elites” etc.

1. Women's access to socialist science

The career of Bulgarian women scientists began at the end of World War I in a university milieu. During the interwar period, they successfully infiltrated the “academic field” (Bourdieu), holding positions of Assistant Professors, Lecturers and Associate Professors. At the State Academy of Music, they were even elected as professorships. Entering the university audiences, however, did not eliminate social prejudices and did not prevent barriers that persist. “Networks of power” (Foucault) included statutory bans, administrative procedures, negative attestations, postponement, cancellation or failure of career competitions and other “backstage” means (Nazarska 2005a, 2010).

After 1944, the totalitarian state enacted gender equality, “purged” the university staff and created new scientific structures (Mutafchieva, Chichovska 1995, 56-108; Chichovska 1995, 101-128; Marinova-Christidi 2006; Luleva 2018). According to the new laws (1947, 1949 and 1957) and its Statutes (1947 and 1972), the BAS lost its autonomy and was transformed from a non-governmental organization into the “highest scientific institution” with state subsidy, where “the cooperation of Bulgarian scientists with those of the USSR was put on the first place”. The “construction of socialism” was indicated for its strategic purpose, but dialectical materialism – for its methodology (Law 1947, 1949, 1957; Koeva 2005; Zhivkova 2006).

In the late 1980s, a large number of ideological clichés gave way to a pragmatic approach to developing major trends in modern science within 122 units (institutes, research laboratories, and centers), employing a

total of about 16,000 people, 6792 of them scientists (1990)¹ (Strategy 2018, 12; cf. Todev 2017).

2. The Scientific Career of Habilitated Women Scientists at the BAS: results of a prosopographical study

In 2017-2018, a team of the Scientific Archive of the BAS and associates compiled a database of 949 habilitated women in the all units of the BAS (Katsunov, Ivanova, Velichkova 2018). The information was collected through a personal and voluntary survey of still working people, a study of the personal records of retired, deceased or departed scientists, data from reference and anniversary publications, memorial articles and biographical monographs.

For the purposes of this study, 576 biographical articles were extracted from the cited database, whose data were structured in a prosopographical table and the sample was statistically processed. In their totality, the available statistical units constitute a sufficient information array that can provide reliable information about the studied processes and phenomena. In the presentation of the results below, the fragmented or absent biographical information has been taken into consideration.

The prosopographical analysis shows that in 1945-1989 the tendency of formation of the university educated female elite in large cultural and economic centers had remained. The women enrolled at the BAS were born mostly in cities (86.1%) rather than villages (13.9%), despite the intentions of the new government to create the "people's intelligentsia" as the "vanguard" of the "working class" and of "cooperative peasants". Among the dominant city centers of origin were: Sofia, Plovdiv, Sliven, Varna, Bourgas, Rousse, Kyustendil, Pleven, and others.

The group was ethnically homogeneous. Only about 6.3% of women scientists were of non-Bulgarian background. Foreigners (63.9%) dominated over representatives of local ethnic minorities (36%). The largest number of these who made marriage migrations were USSR citizens (ethnic Russians, Ukrainians, Uzbeks etc., 52.8% of all non-Bulgarians), followed by Hungarians and Poles. Local ethnic communities were represented by Jews (19.4%) and Armenians (5.6%), who were highly integrated into the educational system, as well as by Turks (5.9%) and Greeks (2.7%).

The sample is dominated by two age groups that had opportunities to be fully realized during the study period, the cohorts born in 1941-

¹ Th number of staff members increased: 1956 – 1834; 1959 – 2548.

1950 (32.6%) and 1931-1940 (30%). They were followed by cohorts born in 1951-1960 (15.1%) and 1921-1930 (13.2%) – the first making their first not yet advanced in their careers by 1989 and the second probably less chances for career growth. The cohort of 1961-1970 (1.4%) remained entirely in the “periphery” for generational reasons, and the cohorts of 1901-1910 (1.2%) and 1891-1900 (0.7%), who were active until the 1960s.

Unlike the previous period, when the female educated elites studied mainly abroad, women from the BAS graduated in Bulgaria (91.4%), probably as a result of the Cold War, the expanded network of domestic educational institutions and the introduced system of privileges in higher education (Chichovska 1995; Boyadzhieva 2010). The share of graduates from abroad was minimal (8.6%): the USSR (75.5%, including USSR citizens), communist countries – GDR (10.2%), the Czechoslovak Republic, Poland, Hungary, and Romania (2% each), and Austria, Italy, and India (2.0% each). It should be noted that the BAS did not developed the arts and that women scientists did not work or made their careers in many of the institutes of BAS, considered as technically by profile.

The habilitated female scientists prepared their doctorates mainly in Bulgaria and particularly in the institutes and laboratories of the BAS. Rarely were those who hold doctoral degrees at domestic universities or abroad. The highest number of doctoral students was in the USSR (86.8%), followed by the Czechoslovak Republic (4.4%), Poland (2.9%), and GDR (1.5%), but also in France, Sweden, and Italy (1.5% each).

Domestic graduates most often “fill in” the gaps in their knowledge and were subjected to powerful ideological processing and pressure to “absorb” new theoretical and methodological tools during their numerous postdoctoral studies in the USSR (31%). Almost every third woman scientist practically made such educational migrations after her admission. 61.3% of women improved their knowledge in the communist countries, and 38.7% - in the rest of the world. Leading in the list were Poland (9.3%), France (9.1%), GDR (7.5%), Czechoslovak Republic and Germany (6.4% each), and Italy (4%). In the 1980s, postdoctoral fellows travelled far away, in countries with ‘left wing’ regimes or high tech development: Japan (0.7%), India (0.4%), Kenya, and Israel (0.2% each).

The average age at entry to the BAS (Junior Research Fellow) was 30.6 years, and the period between graduation and appointment was 8.8 years on average. These high values could be explained by a number of circumstances that delayed the “start” of women’s career: 3 years compulsory post-graduation work at places where the state needed (so called

razpredelenie); early marriage and subsequent maternity leave, regulated from the late 1960s to 1 year after birth; sophisticated staff recruitment system requiring preliminary reviewing the personal files and need of recommendations from the Communist Party members; the limited vacancies in the BAS, which were allowed only after retirement, incl. by transfer from other scientific institutions (universities and scientific institutes of the ministries).

Female scientists defended their doctorates (then called *aspirantura* according to the Soviet model) on average at 35.9 years of age, while their habilitation was postponed to an average of 45.7 years. Of course, there were various individual exceptions, e.g. acquisition of the Ph.D. degree at 27 and 57 years old, or attaining the title of “Senior Research Fellow, 2nd degree” (Associate Professor) at 37 and at 57 years old, but these cases were explained by the variety of vertical mobility tools used by scientists. In general, the preservation of the late-habilitation phenomenon of pre-1944 can be noted. From the context, it appears that this is precisely the result of maintaining the gender “glass ceiling”. The age of defending of Ph.D. was related to the “delayed” start of the career, to the system of state planning of postgraduate studies by institutes, and not the least to the woman’s “double burden” – career and family responsibilities.

Habilitated women in the BAS were unequally represented in various scientific fields. Those in natural sciences (46.4%), humanities (30.6%) and social sciences (8.9%) dominated, followed by these in technical (6.3%), medical (4.7%), art (2.6%) and agricultural studies (0.7%). This balance was a consequence, first of all, of the institutional structure of the BAS, where the agrarian sciences were not developed (the Agrarian Academy of Sciences was established), the art studies and cultural studies were limited into two institutes, and many new institutes and laboratories of natural sciences were founded in the 1950-1980s. Secondly, the number of institutions with experimental activities (in laboratories, greenhouses, etc.) required numerous lower staff. The social environment also favored the natural science as the “queen of progress”. The economic needs to link science with industrialization also contribute to this. However, professional prejudices and negative stereotypes towards women in technical and medical specialties should not be neglected (cf. Proykova, Lazarova 2005).

The career growth (years between admission as “Junior Research Fellow” and the acquisition of the title of “Senior Research Fellow”) for women scientists for the whole BAS had taken average 13.7 years. In various scientific fields it was as follows: in social sciences 11.4 years, in

medical sciences 11.7 years, in humanities 13.3 years, in natural sciences 13.7 years, in technical sciences 14.3 years, in agricultural sciences 15 years, and in arts 16.3 years. Within the sciences could be find curious results: in Geology 11.3 years, in History 11.6 years, in Philology 12 years, in Economics 12.2 years, in Medicine 12.9 years, in Physics 13.5 years, in Arts 13.6 years, in Biology 13,8 years, in Engineering 14 years, in Sociology and Psychology 14.6 years, in Chemistry 15.5 years, in Agronomy 17.1 These results convince in the priority given by the Communist regime to the “ideological disciplines” of History and Economics, and in the dependence of scientific careers on both the gender ratio in a particular institute or scientific field, and the relationship between science and industrial production.

The “glass ceiling” for women's empowerment in science can be verified by other means. The prosopographical data give evidences that even habilitated women remain away from the real “power” both whole Academy and in their own institutes.

The study supports the conclusion that women were not empowered to administer science, with the observation that only 9.8% of scientists were elected as heads of sections, 3.7% became scientific secretaries of institutes, 1.9% were appointed as Deputy Directors, 2.5% had been working as directors (mainly in scientific centers and laboratories, not so many in the institutes), 1.8% were appointed as secretaries of the Unified Centers and of the BAS, only one (Prof. Paraskeva Simova, physicist, in 1978-1982) was included in the Management Board of the BAS.

There are also unfavorable statistics on the awarding of women scientists with higher academic titles – up to a total of 34 to date. During the survey period only 5 women were selected as corresponding members of the BAS: geneticist Raina Georgieva (1952), philologist Dora Ivanova-Mirtcheva (1981), physician Olga Polyakova-Krasteva (1989), and physiologists Maria Papazova (1984) and Anna Varbanova (1984). The other 14, though with long careers at the BAS, had received well-deserved recognition after 1989: physicist Tsvetana Marinova (2004), philologist Emilia Pernishka (2004), archeologist Henrieta Todorova (2004), art historian Elka Bakalova (2005), archeologist Yordanka Yurukova (2008), philologist Maria Popova (2008), historian Romyana Radkova (2009), physicist Valentina Petkova (2012), art historian Svetlana Kuyumdzhieva (2012), chemical engineer Vasya Bankova (2014), art historian Ivanka Gergova (2015), biochemist Ilza Puzheva (2015), meteorologist Ekaterina Bachvarova (2018), and folklorist Mila Santova (2018). During the totalitarian period, the BAS had only one female academicians – geneti-

cist Raina Georgieva (1961). So far, only 2 more scientists have been selected: historian Vera Mutafchieva (2004) and chemist Dotchi Ekserova (2004).

Women ranked among the “reputable elites” (including those outside the BAS and foreign members²) were specialists in Medicine, Biochemistry, Genetics, History, Archeology, Philology and Art Studies; Physics was placed at last. This arrangement clearly indicates the existence of “higher” and “lower” specialties within the professional fields, but also preservation of “gender roles” in science, i.e. for the humanities, art and cultural studies as being more gender “appropriate”. So far³ the share of women within the Assembly of Academicians and Corresponding Members is negligible and is not comparable to the share of working and habilitated women in the BAS. The average age at which academics are honored is 67.7 years and of the corresponding member is 66 years. Although the average age tends to fall around 60 in the last decade (this is related to the vertical mobility of the cohort born in the 1950s), female scientists receive their recognition at the end of their working careers shortly before retirement.

The database show that women scientists of the BAS had really participated in “reputable elites”. There are many examples. Within their own institution, they received insufficient recognition taking account of awards system: only 6% were awarded the BAS Badge of Excellence, 1.1% were awarded the “Marin Drinov” Honorary Badge of Contribution, a few were the winners of the “Cyril and Methodius” Prize (0.5%), of the “Paisii Hilendarski” Prize for Bulgarian Studies (0.7%) and of the “Nikola Obreshkov”, “Vassil Zlatarski”, “Vladimir Georgiev” Special Prizes (1987).

The Academy sporadically nominated its women scientists for state awards: only 10.5% of them were awarded the “Cyril and Methodius”

² Out of this group are women scientists not working at the BAS: 2 academicians – physician Petya Vasileva (2005), biotechnologist Maria Baltadzhieva (2015), and 8 corresponding members – philologist Milena Tsaneva (1997), physician Petya Vasileva (2003), biotechnologist Maria Baltadzhieva (2004), physician Mila Vlaskovska (2007), jurist Tsanka Tsankova (2008), microbiologist Yordanka Kuzmanova (2008), art historian Aksiniya Dzhurova (2008), physician Draga Toncheva (2015). There are 2 foreign corresponding members: English writer Mercia McDermott (1987) and Greek archeologist Helene Glykatzi-Ahrweiler (1989).

³ Currently, female academicians are 3.3% of the academic staff, corresponding members are 18.2%, and foreign members are 3.8%.

Order (specifically aimed at intellectuals⁴); the share of the “Honored and Distinguished Scientists” (1.2%) and the Dimitrov Prize winners (0.5%) was minimal, although there were honorary doctors at Bulgarian, French and Japanese universities (0.2%), winners of the French “Academic Palms” (0.5%) and the Herder Prize for Slavic Studies (1.1%), despite being honored with the title of “Honored Inventor” and being inscribed in the Golden Book of Inventors. On the contrary, it turns out that women scientists were more awarded for their political merits with “People's Order of Labor”, “Red Banner of Labor” Order, “People's Republic of Bulgaria” Order, “September 9th” Order, and “1300 Years Bulgaria” Medal (6% in total).

The database also provides information on the labour migrations of the female staff. The delayed start of the career due to institutional obstacles (preliminary reviewing the personal files, requirement for guarantors, etc.) caused many of those who wish to work at the BAS to search for other ways. Such tool was the transfer from another institution under internal rules. In the 1970s, women who started their scientific careers at universities (Sofia University, Mechanical and Electrical Engineering Institute, Institute of Chemical Technology, Medical Academy, Institute for the Advancement of Physicians, Higher Institute of Food Industry – Plovdiv), Communist party structures (Academy of Social Sciences and Social Management at the Central Committee), museum institutions (National Archeological Museum), departmental institutes with a scientific profile (Republican Institute of Epidemiology, National Institute of Hygiene, National Institute of Meat Industry etc.), incl. abroad (Joint Institute for Nuclear Research at Dubna etc.) were appointed to the BAS. Such relocation proves the existence of outside institutional mechanisms and the intervention of empowered factors in the BAS for the purpose of creating privileges (cf. Kabakchieva 2009).

Since the beginning of the political changes in Bulgaria (1989-1990), this so attractive institution had been quickly abandoned by its women scholars. Some of them used their contacts abroad to stay there for long-term specializations or teaching contracts. The most preferred were the USA (1992-1998), Austria, Germany, England, Switzerland, Portugal, as well as some Bulgarian universities (Sofia University, Veliko Tarnovo University and Technical University), private companies and others. Women biologists, microbiologists and chemists, led by low

⁴ The “Cyril and Methodius” Order (1950) occupied the seventh place by importance in the totalitarian prize hierarchy.

salaries at the BAS, their own abilities (foreign language skills, experience and qualifications) and the desire for rapid career growth were particularly mobile. However, it is important to note the “long duree” of actual break with the institution. Although permanently established abroad, women scientists preferred to have a “back up” option in their immigration strategies, the BAS also decided to keep their jobs until they returned.

3. Scientific Career of the Habilitated Women Scientists at the BAS according to the Official Documents

The statistical results of the prosopographic survey could be compared by the data from the personal files of women scientists⁵. They reveal in a narrative way the factors that stimulate or retain a woman's professional career.

Factors promoting vertical social mobility. Particularly important for the beginning of women's scientific careers at the BAS were their *family and kinship networks*. Their fathers were highly educated, mostly intellectuals (physicians, agronomists, engineers, teachers, journalists, directors, accountants, prosecutors, conductors, etc.); the children of workers and peasants were among exceptions. They occupied high positions in industry (directors and chief plant designers, paid Communist party secretaries), science and higher education institutions (directors of institutes, rectors, academics, professors, heads of State Committee for Science and Technical Progress⁶), state administration (officers, financial resistors) and government controlled organizations. An important advantage of these was the status of “Active fighters against fascism and capitalism” (AFAFC), political prisoners, partisans and the Dimitrov Prize winners (cf. Angelova 2010; Vodenicharov, Angelova 2008).

Mothers of female scientists were also highly educated. They had been working as teachers, accountants, journalists, editors, scientists and others. The daughters of workers and clerks were less common. Like fathers, they also provided opportunities for professional growth of their children, having privileged statuses of AFAFC, political prisoners, ex-guerrilla fighters, and activists of the Young Workers' Union and of the Communist Party. The family milieu was complemented by brothers, sisters and other close relatives who had been working at the Central

⁵ Institutional Archive - BAS. Personal files of female Senior Research Fellows.

⁶ The State Committee for Science and Technical Progress (1962-1971), which had coordinated the activities of the BAS, higher schools, and other scientific units.

Committee of the Bulgarian Communist Party, Ministry of Interior, Ministry of Foreign Affairs, Partizdat (the BCP Publishing House) and others.

Female scientists most often married their fellow students or colleagues at the BAS. They were highly educated and represented mostly the “people's intelligentsia” (engineers, doctors, architects, chemists, investigators, agronomists, etc.). Few of them were encountered by workers. The spouses were appointed of management positions in prestigious institutions with strict class selection and high payments: higher education (Sofia University, Medical Academy, High Institute of Medicine – Plovdiv, High Agrarian Institute, etc.), engineering and industrial associations (“Vodproekt” [Hydraulic Engineering Design Institute], “Sofproekt” [Institute for Architectural Design of Sofia], “Kooproekt” [Design Institute at the Central Cooperative Union], “Metalhim” [a state-owned company managing the military industry]) etc.), the Ministry of Interior, the Ministry of Defense, the Diplomatic Corps, State Security (SS). Their affiliation with the “nomenclature” suggests that two options for marital strategies were possible: both women scientists considered marriage as a “social elevator” and spouses sought a hypergamous (unequal) marriage with women whose parents had privileged statute. This model was most characteristic of the mixed marriages of the Bulgarian men with the Russian women scientists or of the Bulgarian women with the Russian men scientists, as the Soviet citizens were treated by special legal provisions, which provided them with advantages in appointment, promotion, etc.

Family and kinship networks were especially important when they were built by scientists working in the same field. The so-called “*scientific dynasties*” were a huge incentive in material and spiritual terms for the careers of women scientists in their entirety. Within the BAS, these cases were (and are) numerous⁷. They argue that maintaining this mechanism, existing in the previous period, had become particularly important for both the “piercing” of the “glass ceiling” but survival in a highly competitive environment where vertical channels of non-scientific matter were used. If before the Second World War mentors were predominantly

⁷ In the BAS were appointed daughters of professors and academicians Dimitar Balarev, Razum Andreichin, Christo Vakarelski, Emil Georgiev, Todor Gerasimov, Christo Danov, Ignat Emanuilov, Lyubomir Zhelyazkov, Iosif Shklovsky, Strashimir Dimitrov, Rostislav Kaishev, Nikola Mavrodinov, Dimitar Mihalchev, Nikola Platkanov, Blagovest Sendov, Angel Stefanov and Pavel Mindorovski; niece of Nikolay Liliev; wives of Dimitar Mishev, Evgeni Golovinski and Nikolay Golemanov, and others.

fathers, in the period of the 1940s-1980s mothers, brothers, sisters and close relatives also became mentors⁸. The tradition of strong support among the spouses scientists, whether they had been working at the same institutes, within the BAS system or at universities, was continued⁹.

Family and kinship networks were important as a supporting channel of rise in the scientific hierarchy of women with background of Party “nomenclature”: daughters, wives, daughters-in-law, and relatives¹⁰. At the BAS, they had made fast and easy career development, reaching management positions and high scientific degrees. Sometimes this was used by their direct principals for their own professional and Party line benefits, incl. to expand and equip institutes or laboratories. The downward mobility in the careers of these scholars was closely connected to reversals in the Party and official positioning of their relatives¹¹.

Often family and kinship networks overlapped with *interest groups networks*, since many of the appointees' parents were related to each other, such as AFAC, former guerrilla fighters, political immigrants in the USSR, and political prisoners. As such, they had a number of privileges, including their children and even grandchildren (see Angelova 2010; Boyadzhieva 2020; Vodenicharov, Angelova 2008).

Characteristic of social mobility in the BAS was the connection of family and kinship networks with *neighborhood networks*. The phenomenon of “fellow citizen” growing into *patron-client networks* was decisive in many of the cases considered. Especially when it comes to settlements historically related to guerrilla or events, related to the BCP activi-

⁸ The daughters of Professors Vasilka Tupkova, Vera Mavrodinova, Yordanka Patcheva, Dobra Popova, and others were appointed at the BAS. The Platikanov – Trifonov – Mutafchiev family gave at least 5 scientists, incl. Vera Mutafchieva, academician, and Veselina Platikanova, Senior Research Fellow.

⁹ There were numerous examples of family couples who worked at the BAS, such as: physicists Evgeniya and Gencho Skordev, physicists Alla Shklovskaya and Vladimir Penev, engineer Dimitar Mishev and linguist Anastasia Misheva, historian Vasilka Tapkova and philologist Jordan Zaimov, historians Rumyana and Ivan Bozhilov and others. There were many female scientists married to university scientists, e.g. microbiologist Danka and chemist Boris Galabov, archeologists Alexandra and Atanas Milchev, sociologist Pepka Boyadzhieva and philosopher Tsocho Boyadzhiev, archeologists Maria Chichikova and Dimiter P. Dimitrov, and others.

¹⁰ At the BAS had been working: daughters of Todor Zhivkov, Kiril Zarev, Georgi Chankov, Christo Santov; wives of Jordan Yotov, Dimitar Stanishev, Zhivko Popov and Krastyo Petkov; sister of Nacho Papazov, and others.

¹¹ This happened with wife of Zhivko Popov – Deputy Foreign Minister and Ambassador, following his arrest and conviction (1981-1982).

ty, such as the cities of Batak and Bratsigovo, or the villages of Yastrebino and Dalboki. At the doorstep of the Academy, women and their parents begged patrons of their neighborhood to give guarantees the State Security and the authorities that their protégé were loyal and reliable. They elected long-time BCP members holding senior positions or AFAFC status. Some typical cases may be mentioned: the BAS Chairman Todor Pavlov; female partisan from the Radomir guerrilla unit, who was chairlady of the District People's Council (local municipality) in Sofia; head of department in the Central Committee of the BCP, or wife of "Hero of the USSR" nominee.

The available documentation does not support the claim that *educational networks* were a significant channel for the vertical mobility of women scientists at the BAS, because a small part of the recruits received an advantage based on their qualitative training. Indeed, many graduates of high German, English, French and Russian language schools and American colleges, or graduates of higher education and postgraduate studies in the USSR and socialist countries, or specialized in well-known scientific centers, had been working in certain professional fields and specialties. But even in the 1980s, these obvious advantages that would have fueled upward mobility were offset by other factors favored in a totalitarian state.

Firstly, such factor was the working class background and the institution of the Workers' faculty (*Rabfak*), which gives an "entrance" of a number of former factory workers and clerks active in Komsomol (Young Communist League) or Party activity to higher education without exams. Secondly, party membership was very valuable. The former or actual associates of the Komsomol, Communist Party and trade unions' secretaries, trainers at the Central Committee of the BCP, and others, had distinguished professional careers in humanities and social sciences¹². It is significant that even non-party and members of the Bulgarian People's Agrarian Union were forced to attend evening Marxist universities. That was the only way they would be able to "move" towards enrollment as Ph.D. students, be offered for a specialization, etc.

In some situations, other *interest groups networks* created over the years had also been activated. For example, in the mid-1950s, at the BAS was appointed with Todor Pavlov's strong patronage his associate by the VMRO. 15 years later, he saved her from dismissal for financial miscon-

¹² As early as 1947-1948, 2/3 of the enrolled research associates in the BAS were communists (Zhivkova 2006: 285-286).

duct, sending petitions to the Secretariat of the Central Committee of the BCP, Sofia Municipal Council, and Committee of Art and Culture¹³.

Professional networks can be added to the *interest groups networks*, but not so much in the traditional dimension of trade union structures or contacts from previous jobs, but as belonging to State Security structures. Collaboration with this institution may have been an important lever in the careers of some women historians, archaeologists, art historians and philologists working for cultural and historical intelligence on the “1300 Years Bulgaria” Project. Women scientists in the natural sciences, who subsequently made a successful career in the management of the institutes and the BAS, were attracted mainly by intelligence and technical intelligence. A typical example is a factory owner's daughter, who until her age of 34 held the lowest technical assistant position, but in the following years she was sent for advanced research in Western European countries¹⁴.

Facilitating women's professional careers at the BAS before 1989 was also the legal framework that allowed work on two employment contracts, legalized with the establishment of Unified Centers for Science and Training between the BAS and the Sofia University (1972) and high salaries. For example, in 1988 the salaries in the BAS amounted to 300-550 BGN, but for the specialists with higher education in the country they ranged from 230-450 BGN for the average levels and from 350-550 BGN for the managers (Decrees of the Council of Ministers №66/30.12.1987, №10/11.04.1988). Also important was the ever-expanding scale of the institution, which required staffing and allowed horizontal mobility between the different units. If in 1956 there were 1834 people employed in the BAS, in 1959 they were 2548 (Gardev 1986, 80)

Factors impeding vertical social mobility. A review of women's personal files shows that their careers had encountered resistance of different nature.

Above all, it stems from regulatory and administrative reasons. According to the Higher Education Act in force at the time, 3 years post-graduation work was compulsory. The Act and the Regulations for the Application of Scientific Degrees and Titles (ASDTA) set a threshold for postgraduate study of 30 years and centralized number planning for each institute (Act 1972; Regulation 1953; Ordinance 1978). The requirement

¹³ Central State Archive, f. 286 Б, op.1 , a.e. 205, l. 183-185 rp.; a.e. 90, l. 2-5; a.e. 251, l. 6-9.

¹⁴ Institutional Archive – BAS. Personal file of E.T., Senior Research Fellow.

of 35 years at the ASDTA had often hampered older applicants for research assistants, especially women who, due to their early marriage (at the average age of 22)¹⁵, also giving birth to at least 1-2 children (up to average age 28) found it difficult to meet these constraints. This observation is particularly true for cohorts of 1941-1950 and of 1951-1960, who were subordinated to the patriarchal model and wished to benefit from the extended maternity leaves up to 2-3 years of age of children (Decree 1968; Code 1986 ; cf. Sharkova 2011)¹⁶.

Additional obstacles for women scientists were the complicated and lengthy procedures for acquiring Ph.D. degree and for habilitation, which were approved by the structures of the Higher Attestation Commission – a centralizing and censorship body in science. The optimal period for them was 9-12 months. For this reason, women who remain at least average 9 years at the lowest level of specialists (technical assistants) then had to work at least 6 years as Junior Research Fellows in order to obtain all three degrees of this scientific title. To this may be added their paid maternity leave, their marriage migrations to accompany their spouses during their stay abroad (2-3 years), and their short-term specializations after child-rearing. Thus, the period between their admission to the BAS as specialists and their habilitation took more than 10 years. It is no coincidence that in the 1980s, despite the pronatalist measures of the authorities, there was an increase in the number of divorced and unmarried scientists and a decrease in the number of children in families¹⁷.

Demographic factors, combined with regulatory requirements, were an insurmountable barrier to women's career growth, unlike the political ones enshrined in the Statutes of the BAS (1947, 1972), which required candidates to have a good characterization of their business and political qualities. The "Human Resources" Service was in charge of verifying

¹⁵ Bulgaria is characterized by early marital distress for women, and in 1960-1990 it was at 21-21.9 years (Zhekova 2011: 27, 65).

¹⁶ In 1951-1968 the period of maternity leave was 8 months, in 1968-1986 - 1 year for the first and 14 months for a second child, in 1986-1989 - 2 years paid leave and 1 year unpaid. Usually, leave was used to its full extent, since in the 1970s there was a low capacity of nurseries and kindergartens.

¹⁷ This is in line with general trends in the country, e.g. since 1960 the proportion of unmarried women has increased, and since 1975 it has doubled. The average number of children born per woman for the cohorts born up to 1930 was 2.1, for cohorts born in 1930-1966 was 1.8, for the younger cohorts was 1.5 (Zhekova 2011: 39, 89).

their loyalty to the authorities, which, at least until the end of the 1960s, was strictly fulfilling its tasks, requiring at least 3-4 recommendations.

Usually, in the presence of “hostile acts” in the personal files of the applicants themselves or their family members, a refusal followed. For example, in 1947 the new President of the BAS, Todor Pavlov, put a negative resolution on a statement by a candidate for research assistant, who had previously been fired in “purge” of fascists as a high school teacher¹⁸. The selection at the “entrance” of the institution had forced some women scientists not only to take steps to “delete” from their personal files any incriminating facts, but even to completely reconstruct their biographies (cf. Nazarska 2015, 2018). One of them, whose father with Russian émigré background was arrested and sent to Gulag by Soviet occupation authorities (1944), falsified her family name, “invented” his imaginary death on the front, became an activist of the Komsomol, began work as a factory worker, studied as *Rabfac* fellow and was fully recruited at the BAS with regular documents¹⁹. Another woman scientist, retained as a research associate for 12 years, because of her father's job as mayor before 1944, in the 1950s-1960s gathered testimonies from old party members from her hometown and posthumously his father's “correct” biography. In the late 1970s, he became from “fascist” to AFAFC. Later, seeking to become a Professor, she “invented” the imaginary involvement of her grandfather in the September Uprising (1923)²⁰.

Conclusion

The prosopographic survey, supplemented by a historiographical analysis of the primary documents, compiled a sufficiently informative collective portrait of habilitated women scientists at the BAS in the period 1944-1989.

Working in an ever-expanding and structured according Soviet model scientific institution, they were a small and inhomogeneous group, divided along scientific fields and internal professional hierarchies. Unlike the first half of the 20th century, and due to the processes of social engineering in the 1950s-1980s, their access to science was greatly facilitated, but not without difficulties, given the new political and class selection criteria.

¹⁸ Scientific Archive - BAS, f. 1c, op.19, a.e. 38, l.7.

¹⁹ Institutional Archive – BAS. Personal file of V.V., Senior Research Fellow.

²⁰ Institutional Archive – BAS. Personal file of E.G., Senior Research Fellow.

In addition, there were challenges in their individual (vertical and horizontal) social mobility throughout the period. Barriers were primarily a result of social conditions rather than a lack of subjective motivation, ambition or ability. Although ascending, the ascension in the scientific hierarchy was of slow speed and of limited intensity, i.e. it was done gradually and by a small number of women scientists. The existence of a “glass ceiling” in career growth proves the effect of invisible “networks of power” that had been activated in certain scientific fields, specialties and institutes (cf. Sretenova 2005). Against this background, women scientists rarely used the traditional channels of social mobility and women's professional solidarity. Instead of educational, professional or interest groups networks, they resorted to the family and kinship networks, neighborhood networks and political networks of the nomenclature from which the majority of them originate.

The women scientists at the BAS worked in socially respected institution and practiced a profession, then considered as a prestigious occupation. However, they did not empowered themselves to such an extent that they were equally included in the scientific “reputable elites”. Few of them had national prominence and received adequate state honors and awards, although their undoubted contribution to the development of Bulgarian science in the second half of the 20th century.

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European Ideals and National Identity in Georgian Emigrant Literature of the XX Century

Abstract: *The political processes of the 20th century became a kind of test for Georgian writers, the passing of which was largely manifested by the writers' physical presence-absence, the denial of their own beliefs. Immigrant literature has become a form of free expression of dissident thoughts. The authors were forced to move to another language space for their spiritual and physical survival in order to at least somehow get closer to the national culture. However, new contradictions arose at the same time. Writers lived in a foreign country, in a society of a different mentality and worldview, for which the topic that was close to the Georgian way of life could possibly be completely alien and uninteresting. The works of Georgian emigrant authors could be incompatible or less compatible with foreign literary discourse.*

The goal of writers and poets of the early 20th century was to remove the shackles of imperialism from Georgia and to become closer to Europe. The Soviet authorities launched a cruel and immoral campaign against the writer, caused by the ideology of that time. One of the outstanding representatives of this particular era was Grigol Robakidze.

The present paper deals with the research and analysis of the movement that began at the beginning of the 20th century and was aimed at bringing Georgia closer to Europe; it also discusses the reasons that served the public to appeal to European ideals and how the struggle went on to establish their cultural values. Grigol Robakidze's German-language work is essentially a part of Georgian literature.

The writer was delighted with the poetic greatness of the Georgian language and its capabilities. Robakidze's works clearly show his selfless love for the motherland. He was in love with the Georgian language, the Georgian land, the Georgian character and, in general, with everything Georgian. It is easy to imagine that the stay in emigration even more strengthened the writer's patriotic feelings. The creative path of the

emigrant writer was in expressing his own and national identity, on the one hand, and in adapting to the literary environment, the part of which the author should have become himself, on the other hand. Thus, he did not move away from his native roots and found his place in a foreign literary discourse.

Key words: *ideology, dissident journalism, emigration, national identity, European values.*

Introduction

“I have a desire: when I leave this world, let a Georgian mother come to Mtskheta every year, on my birthday, to light a candle in front of this small icon and to pray for me. I would ask nothing more from Georgia”.

Grigol Robakidze

An important era in the history of Georgian literature begins at the end of the 20th century. Along with the reassessment of old beliefs, many innovations are being introduced from Europe into the Georgian cultural space, many “isms” appear. New thinking introduces new topics, ways and forms of decision.

The goal of the great writers and poets of the early 20th century was to free Georgia from the imperialist yoke and bring it closer to Europe. The great representative of this era is Grigol Robakidze, whose journalistic essays largely determine the dominant of Europeanism in Georgian literature, which was manifested in symbolism, impressionism, dadaism and other literary movements.

The political processes of 20th century became a kind of test for Georgian writers, the passing of which was largely determined by the physical presence or absence of a writer, the rejection of author’s beliefs and views, the false admiration and pathos. Soviet reality required unconditional obedience. However, when Soviet ideologists realized that literature could become a kind of mouthpiece with which it was possible to arouse sympathy and support in society for everything that existed without any efforts, then they decided to make every effort to “tame” literature. The process itself was to take place under the revolutionary slogan: “He, who is not with us, is our enemy”.

For people of a creative spirit, both forms of protest — silence or frank expression of their views — were equally impossible and dangerous. The are impossible, because if a writer has not expressed his own “ego”, has not animated himself with an artistic word, then he is no longer a writer. At the same time, representatives of the dictatorship of the proletariat perfectly understood that silence did not always mean agree-

ment. Non-confirmation of the position meant that a writer had to abandon his work, and indeed, the literature. Both of these forms of protest meant the stigmatization of a writer as a “people’s enemy”, and from here to exile or execution there was only one step away. However, Georgian literature, despite great sacrifices and enormous efforts, nevertheless, managed to remain true to itself and was manifested in various forms.

Grigol Robakidze’s literary and aesthetic principles meant the introduction of new ideas and their popularization in traditional Georgian life, what was initially received by a reader rather coldly, but was gradually accepted and approved, thanks to the pathos and attitude of the writer. A huge contribution to the approval and dissemination of the writer’s ideas was made by a group of progressive intellectual writers, one of the most attractive and systematically organized directions of which was the so-called literary order of the “Blue Horns”, which ideological leader was Grigol Robakidze.

This outstanding person created a whole series of completely different linguistic-mental works, the subjects of which are diverse and varied. Despite the variety of issues, Grigol Robakidze’s main idea was not changed, it was aimed only at bringing “the Georgian gene” closer to the world, based on the aspirations of modern literary criticism, when the interdisciplinary research led to the study of postcolonial trends and the introduction of new thinking systems.

The following topics are especially important in the writer's work: the history of Georgia and Asian myths, worldview, socialism and nationalism of Georgia, as well as portraits of such figures as Stalin, Mussolini and Hitler, who were generally influential personalities.

Grigol Robakidze managed to bring literary innovations to Georgian culture so organically that they were not perceived as something alien. He breathed the national spirit into these tendencies, gave philosophical depth to Georgian literature and brought back the myth. “Three factors played a significant role in Grigol Robakidze’s life and thinking: Friedrich Nietzsche’s philosophy, the aesthetics of symbolism and myths. He adapted all this to Georgian reality, altered in a Georgian way and filled with a national spirit” (Injia 2005, 161). So, Grigol Robakidze became a creator of a new era, a preacher and a founder of symbolism in Georgia.

The writer lived 10 years under the communist regime. In Georgia, he created his novel “The Snake’s Shirt”, the plays “Londa”, “Malshetrem” and “Lamara”, poems and journalistic-critical letters. After

the occupation and de facto annexation of Georgia, Grigol Robakidze was constantly harassed by the repressive apparatus of the Soviet state. He had been in political exile since 1931, living in Germany and Switzerland. Grigol Robakidze was one of the prominent figures of Georgian political emigration, who enjoyed great authority among Georgian emigrants.

The life and work of Grigol Robakidze would have been radically different if he had followed a relatively less complicated path. Emigration brought many difficulties to the writer, but it made his name famous outside of Georgia.

European genius in the Europeans' eyes.

Georgian emigrants in Germany, including Grigol Robakidze, were engaged in national-patriotic, cultural, educational or scientific activities. Grigol Robakidze's creative heritage enriches not only Georgian but also German culture. During the study, it was interesting to learn how foreign scientists and readers perceived Grigol Robakidze's activity. His works gained great popularity in Europe in the 1930s, especially in Germany. Most of works, written in German, occupied an honorable place in German literature. As a result, a lot of articles, reviews and essays, highly appreciating Grigol Robakidze's work, have been published in the European press.

In the introduction to the German edition of Grigol Robakidze's novel "The Snake's Shirt" in Jena in 1928, Stefan Zweig wrote: "... only the son of his people, spiritually rooted in it, can make real exoticism in poetry ... I think that Grigol Robakidze's novel gave birth to another new nation ... Georgian nation resides in world's one of the most beautiful areas. It is a shame that these people who have made their name through their songs and legends, mythical tales, full of heroic characters, are still unknown to us, Europeans. From this book I learned how rich this nation is with its mystical power, to what extent it is filled with heroism and at the same time is captivated with modern ideas. Each page of the book contains something chaotic, fiery lines, extracted from old legends and ballads, are beautifully knitted into the carpet of narrated stories ... and although, it is not clear where this stupefying smell really comes from - the writer Robakidze or Georgia itself - I still want to surrender to this sweet captivity" (Sharadze 2005, 14).

Perhaps Zweig would really have visited Georgia, if not for the political events that soon swept the whole world, and the victims of which, ironically, became the both writers. Unfortunately, the Austrian writer

who wrote the preface to “The Snake’s Shirt” did not visit Georgia. Otherwise, perhaps, after this meeting, he would certainly give Grigol Robakidze’s personal description. It would be interesting to see Grigol Robakidze, the Georgian writer, highly educated, with unmatched looks and sophisticated manners, through Zweig’s eyes.

After that, the writers did not meet again. Three years later, Grigol Robakidze fled from the communist regime and settled in Germany. Even the mention of his name was banned in Soviet Georgia. In Austria the same fate expected Stefan Zweig, the “great European”, as he was called. He escaped from the Nazis, who burned his books in public, because of his Jewish origin.

Grigol Robakidze did not end his life as Stefan Zweig, probably only because he was a deep-believing Orthodox. However, he repeatedly thought about suicide, what is confirmed by his letter to Akaki Papava: “I admit, I have often wished myself a quick death, so, I have sinned before the Lord ...” (Jolokhava 2008, 204).

The German writer Wilhelm Schäfer wrote about Grigol Robakidze's “Demon and Myths” (Jena, 1935): “I was particularly struck by Robakidze's ability to speak German. Here we can feel sources inaccessible to us” (Sharadze 1991, 181).

Marcel Brion, a member of the French Academy of Sciences, a literary critic, devoted an extensive introduction to the French translation of Grigol Robakidze’s novel “Megi”:

“Only the great talent of this extraordinary writer can create such brilliant metamorphoses... “Megi” is divided into various chapters that are real poems in prose. Each chapter is so perfect and independent that can be considered a separately completed poem... we can say that living breathing regulates the rhythm and controls the pace... This phenomenon is determined by the narrative itself, which sets it in motion and reveals with the development of the plot. And this happens because, regardless of its content, the narrative itself becomes somehow a living being, a kind of second reality of the book... This talented storyteller either talks about comfort and loneliness, sometimes spontaneously, without literary and artistic load, represents ancient myths, always alive or ready for revival” (Sharadze 1991, 182).

Grigol Robakidze's work was praised by Thomas Mann in the issue of magazine "Bedi Kartlisa" N47, published in Paris in 1964.

The German philosopher Leopold Ziglar writes in his monumental work "Überlieferung": "Robakidze is both the son and the grandson of the ruins of the Georgian nation, located in the center of a mythical period of time, as if inherited from life. Unlikely us, he doesn't need artificially acquired memories, he just needs to look around and observe what is awaiting him ..."

Later he wrote: "In these dark days, I again read your two books "The Killed Soul" and "The Guardians of the Grail", and while reading it became clear to me that it took me ten years to understand and correctly evaluate these books... so the apotheosis of Georgia arose. And since "The Snake's Shirt" is considered the prelude to these two books, in the future these three books should be printed as "The Georgian Trilogy" (Nikolskaya 2009, 182).

Hans Paschke, a publisher of the German literary magazine "Mercury", devoted an in-depth study of Grigol Robakidze's works entitled "Offenbarung der Elementen", published in 1936 in the magazine "Eckart", in which he examines the Georgian writer's work in detail.

"There are many spontaneous beginnings in the universe", writes Paschke, "which come from an explosion of volcanic origin, and which in a matter of seconds take on a bodily form, as required by the act of self-creation. The impulses that revive Robakidze's heroes lead us to the comparison, that they supposedly comprehended the world at the time of its appearance, they are not personalities, but the essence of elements of a similar nature ..."

Caucasian identity and European mentality

It is difficult to find a writer, whose personality or work would be so radically different from the attitude of society. Grigol Robakidze was the author of not only beautiful novels, plays and poems, but also an essay dedicated to the two most famous dictators of 20th century (Adolf Hitler and Mussolini), however, at the end of his life, the writer explains in detail what was the real reason for writing his essay.

From a creative point of view, the years spent in Germany were very productive. In 1931-1945, there were published "Megi", "The Killed Soul", "The Call of Goddess", "The Guardians of the Grail", "Demon and Myths". Grigol Robakidze's poems, literary and political works, and essays were often published in the European press. The multi-

lingual collection of “The Caucasian novels” has gained immense popularity in German and other languages.

Emigrant literature has become a form of free expression of dissident thought. The authors were forced to move to another topos, into another linguistic space, with the goal of their own spiritual and physical survival, in order to at least remotely approach national culture. But at the same time, a new obstacle arose. The writer lived in a foreign country, in a society with a different political, economic or ideological mentality, for which topics close to Georgian ethnic existence could be absolutely alien and uninteresting. The intellectual and expressive layers of the Georgian emigrant-authors’ works turned out to be incompatible or less compatible with the literary discourse of a foreign country.

The creative path of the emigrant writer was to be based on the presentation of his own and national identity, on the one hand, and on the adaptation to the literary environment of which he was to become a part, on the other hand. In other words, the writer had to find a code that combines subjective and objective elements of his existence. Thus, he would not have retired from his native roots and could have established himself in foreign literary discourse. Such a unifying code for Grigol Robakidze was the creation of a mythopoetic image.

Among the emigrants of the twentieth century, Grigol Robakidze is one of the prominent figures who, with his work, organically merges with the mainstream of Georgian literature. All the writer's work is devoted to the definition of Georgian reality, ethnic mentality. The basis of his writings is a mythological discourse, as the writer himself pointed out in his letter “At the Origins of My Creativity”: “Those who do not understand symbols and myths, cannot understand my work, I mean the researchers, not the readers. The readers often delve deeper into the essence of a book than the researchers, burdened with equipment” (Robakidze 1996, 81).

For Grigol Robakidze, the myth turned out to be a kind of universal key that opened the door to both Georgian and European literature, because the immortal images that exist in the depths of the myth, their transformational paradigms and relationships, revived in ethnographic rituals, made it possible to connect the Georgian literary space from afar, and Georgian and Caucasian reality has become exotic and intriguing for the European reader. With a constant alternation of empirical and transcendental, physical and metaphysical, historical and mythical, the writer managed to reach the origins of national identity thanks to the concepts of Goethe’s phenomenon and Nietzsche's eternal return.

At the time of writing “The Caucasian Novels”, the change in the political map of the world, the redistribution of territories became a new mystery to the world. The interests of small countries were subject to the desires and aspirations of the superpowers. And the Caucasus region, as always, was a very important territory, as well as the people living here needed to constantly think about their survival, since there was always a danger of assimilation. Salvation had to be sought in self-knowledge, in the fixation of personality.

In such circumstances, the Georgian scientist, Professor Mikhail Tsereteli wrote: “You, dear Grigol, have done a great job for your homeland. Your books in German, such as “The Snake’s Shirt”, “The Killed Soul”, “The Call of Goddess”, “The Guardians of the Grail”, and others, are not old-fashioned novels from “Our Life”, but your original creations. Frankly, perhaps I am exaggerating, but for me there is no other writer who was able to turn prose into a verbal music, symphony with such amazing skill... This symphony marks on the ground... Georgia and the Georgians will be forever remembered and honored because your art will always be admired by those who are chosen for understanding and love of that high art, with the help of which you sang your homeland and people...” (Sharadze, 1991, p. 184).

Short Stories by Grigol Robakidze

When we talk about identity, we must first clarify what we mean by that. This term denotes the fundamental essence, the subjective concept of personality. The term comes from the Latin phrase “Idem et Idem”, which literally means “the same”. Using this term, a person identifies himself with a certain typological category. “The mechanism of identity plays a decisive role in the preservation and transmission of social structure and cultural traditions. Cultural identity is the self-consciousness of participants in a historical unity, as members of the culture of this unity. Ethnic identification is the process of identifying a person with his own ethnic environment, allowing him to master the norms of behavior and cultural values of this ethnicity” (Dictionary of Socio-Political Terms 2004, 321).

Anthony Smith, in his article “National Identity”, presents the defining components of identity. He believes that the historical territory, i.e. homeland, as well as common myths and historical memory, common social masculinity, common legal duties for all members of society, a common economy for members of the union with territorial mobility are evidence of national identity:

“Under the Caucasian identity, we need to understand the similarity by the unifying feature of communities living in the Caucasus. In this case, the Caucasus is a historical territory, inhabited by ethnically diverse tribes, which is perceived as the birthplace of these ethnic groups. The historical memory of the Caucasians is formed by the interdependence, that existed for centuries between individual tribes and expressed in either friendly or hostile relations between them. Regarding the legal side, almost every tribe in the Caucasus had its own customs, although, often its separately taken rule was universal, since it took on a common Caucasian appearance. This can be said about the rules of hospitality, blood feud, hunting. But basically, signs of Caucasian identity should not be sought in everyday details, but in the mental attitude, in the way of thinking, that underlies the concept of “Caucasian”, which is synonymous with the concepts of courage, love of freedom, devotion to custom” (Smith 2008, 157).

Grigol Robakidze studied in detail the ethnogenesis of Georgians and believed that myth is the beginning of both the historical source and the means of cognition of modern reality. All the sacred, whether it was an object or a ritual action, was considered as an attribute of access to the roots of a national phenomenon. Therefore, in order to clarify the role and place of the Georgian phenomenon in universal human discourse, the writer paid special attention to the Caucasus and presented it as a single, indivisible whole.

The author relied on the main maxim that characterizes the mythical worldview, according to which human unity is an integral part of the whole, and the Caucasian mentality is unified, although this region is quite diverse from the ethnic point of view. In this regard, “The Caucasian Short Stories”, published twice in the exile in German (in 1932 by the publishing house “Inzel” and in 1979 - by “Zurkamp”), undoubtedly deserves attention. The collection, which included three short stories, became very popular.

For obvious reasons, this book was not published in Georgia, but Georgian readers still had access to the short stories “Engadi” and “Imam Shamil”, published in the journal of immigrants “Bedi Kartlisa”, which were subsequently published in periodicals and called big interest. And

“The Killing of the Holy Bull” was still unknown and was specially translated along with the preface to the German edition (translated from German by Tamar Kotrikadze).

The author himself wrote about the publication: “My work “The Caucasian Short Stories”, that have just been published, depicts the Caucasus as a single whole. Last year, I was struck by a deep inner awareness: the human heart is a carnal part of the mythically torn God. This conclusion has become life for me” (Robakidze 2013, 7).

In the novel “Imam Shamil”, bold images of freedom-loving Caucasians are presented with the highest expressiveness, and as the author himself says, they convey the general character traits of Caucasians as a whole. The tense and majestic tone of the narrative will not only make the reader mentally and visually feel, but also sympathize with the Caucasian unwaveringness and strong spirit. The writer manages to convey to the reader the essence of the Caucasian phenomenon - the greatest love of freedom. The author shows the relentless struggle of the Caucasus and the enemy not from outside, but from inside. His inviolability and constant renewal is supported by an unshakable faith in the Lord.

For better appreciation of the Chechens’ self-sacrifice and the perception of the Caucasian soul’s identity by a foreign reader, the writer uses several symbols that have become models in world literature. The narration begins with a description of a bewitching sunset, a kind of hint that despite the dedication of the Caucasians, everything has its end. As though the sun of Shamil’s strength should set. The enemy is strong and has countless resources, and the Chechens’ resistance seems already absurd. As if it’s time to think about physical salvation. This idea permeates the mind of the Naibs, but in order to escape from it, the author offers a second unchanging symbol - the attitude of children to the leader. As the mother says, the insane Imam runs out into the field, there he meets little boys who do not know who he really is, but they know that Shamil is the strongest man in the world. “Shamil will defeat you” is a sacred word uttered by a child, in which cosmic energy lurks, which makes the leader feel the power of overcoming and triumphing over himself. He must take communion before the Lord, and with the help of the Lord he will find the energy within himself to defeat the Rubicon. The author introduces the third symbol – the insurmountable abyss. But the one who has seen God, who has known himself through the truth that was spoken with the mouth of a child, will overcome this abyss, that is, he will be able to defeat the seemingly invincible enemy. However, Shamil is not alone, he is with those Naibs who at the beginning of the novel agree with the idea of

reconciliation, but in the finale they embody the inseparable parts of mythical unity, for the freedom of which the Caucasian identity is even ready for self-sacrifice.

By performing sacred rituals, communication with the Lord takes place in the apotheosis of “Engadi”. Its main character, George Valuev, is half Georgian by origin, so he has already genetically united his own “ego” and something else coexisting with it. This personality trait doubles his desire to get acquainted with Khevsureti, which, in his own words, is “the most mysterious tribe not only in Georgia, but throughout the Caucasus” (Robakidze, 2013, p. 31).

The main character is trying to understand the spirit of the Khevsurians, but this is not so easy. A person must be accepted by the tribe, or rather, he must become part of the mythical whole, otherwise all the customs, so sacred and important for each Khevsur, will be incomprehensible to him. At the Khakhmati festival, the character understands that he is not able to internally become a participant, he remains only a spectator.

He felt that “the tribe was a single whole, the fragmentation in it disappeared, and its physical members were only one invisible unity”. To get into this unity, one needs to feel and understand the Caucasian identity. George Valuev analyzes the ritual of righteousness and understands that there is no adultery. This ritual is a pure expression of approaching God and feeling Him. Its roots are lost in the ancient past and it will inevitably tear away everything unfamiliar. The main character also feels a stranger himself and at the same time shares a divine essence. It becomes clear to him that the Khevsurs have only the mentality characteristic of this region, which is manifested in spiritual purity. In the first place there is an internal freedom of an individual, which flows from the free will of the entire community. And masculinity is determined by a courageous attitude, which also takes its place in Caucasian identity.

The third short story by Grigol Robakidze, “The Killing of the Holy Bull”, is about the life of the Svans. The author talks about the original character of the Svan tribe, presenting its ancient rituals, in particular, he describes the first day of Lent after Shrovetide - the Lashkh festival “Murkvamoba”¹ and the carnival ritual of the early spring cycle “Melia

¹ The first morning after the end of the Shrovetide is called Black Monday. On the first day of the Lent, Lashkhis celebrate a great holiday, which is called “Murkvamoba” in Svan. On “Murkvamoba”’s day, almost the entire gorge gathers in the square in Jakhunder. On this day, the Lashkhs living in highlands come down with pipes and flags. They make a large “Murkvami” (tower) out of snow and raise a flag above it. After this, the struggle begins between the opposing sides (i.e. between the Lashkhs of

Tulefia” (or Telefia).² The unity of the community is embodied in the custom of Perkhuli. As in the short story “Imam Shamil”, here the dance demonstrates the unity of the community and mythical integrity. “Perkhuli” has a sacred meaning, its main purpose is to express the connection of unity with the Supreme. The joint actions of the participants take on a double load, firstly, to show their reverence for God, and secondly, to show the nature of the community. In this episode, Grigol Robakidze somehow prepares a reader to understand the meaning of further action. The members of the community should take revenge, because they believe that the killing of the Holy Bull means not only disrespect for their faith, but also a threat to their freedom. All the people, living in Ushguli, served the Lord.

For foreign readers, undoubtedly intriguing was the Caucasian custom of hospitality, which was introduced with the allusion in Vazha Pshavela’s short story “Stumar-Maspindzeli” (“Guest and Host”). Although Futa Dadeshkeliani is an enemy, he was nevertheless received as an honored guest. However, the community is unshakable, and that who insult God must be punished. The community must pronounce a sentence on him and kill him, in this case the mythical inseparable integrity is revealed in the form of thinking. With integrity, conscience will remain clear, and it will not be a murder, but the completion of justice. With this understanding, the community first of all justifies itself before its customs. But even in this case, the murder of a guest is considered a great crime, because a guest in the Caucasus is considered a messenger from God, and, thus, the people of Ushguli commit a godless act.

Grigol Robakidze sometimes uses essay inserts in his short stories. He often explains those phrases that are incomprehensible to a reader (Zankuri, Chanuri, holidays). Such details show that the writer is trying to make the Caucasian identity more visible for the language discourse in which he works.

the highlands and lowlands), headed by a “Caesar”. In the direction where “Caesar” falls during the defeat, they turn the snow tower, and this sign determines the future harvest of the year (from the notes by Arsen Oniani).

² The custom “Melia Tulefia” states that one man gets completely undressed, so his shameful places are exposed. Another man takes him by the hand. The third man also takes the second one’s hand, and so on, until those standing behind obscure the naked man. He (the naked man) covers his bare spots with one hand, and in the other hand he holds a twig and beats off standing behind him people, who try to push him, shouting loudly: “Melia Tulefia, Yo-Yo!” (from the notes by Arsen Oniani).

“In all three short stories, the author creates an art model that reveals Caucasian identity for both foreign and Georgian readers; the writer manages to create a double space of reality - external and internal: the first is achieved through the linguistic stylization, characteristic of Grigol Robakidze, and the second one - by introducing everyday ethnic rituals into the narrative. Thus, the writer first “outside” shows the reader the phenomenon of Caucasian identity (which unites all communities and ethnic groups, living in this geographical region), and then gives the opportunity to feel it from the “inside” and arouses sympathy for it. In all three short stories, the author’s goal is to present Caucasianism as a way of life, subordinate to a certain traditional order, that combines personal and ethnic qualities” (Jinjikhadze 2003, 75).

All the three short stories by Grigol Robakidze still retain their exoticism. Moreover, the writer takes us on a journey through the highlands of the Caucasus. Its native roots are better visible here. Civilization cannot abruptly transform the local way of life. Dominant traditions and customs do not allow people to degenerate, which is more or less inevitable in the face of changing time.

Until the end of his life, Grigol Robakidze remained an admirer of his homeland - Georgia and the native Georgian language, what is also confirmed by his own words: “The Georgians are conceited. But they have the right to be conceited. The language of Georgians is the most ingenious creation among other languages. Its entrenched current holds countless secrets of the world. The Georgian grape cross is also amazing. Such a deep symbol cannot be found throughout the Christian world” (Japaridze, 1988, 208). The scene in all three “Caucasian Short Stories” is different. The time of action seems to be eternal, like a myth. Indeed, there is no past and no future in the myth. It always exists and has a circular form of time. The short stories are small in size, but allow us to look at Caucasian Georgia in an interesting perspective, through Robakidze’s eyes.

The patriotic feelings, aggravated in emigration, are the leitmotif of short stories. Robakidze is proud of his homeland. At the same time, his fighting spirit is tolerant. In the “Caucasian Short Stories” the enemy is not humiliated or insulted. Even the existence of the enemy seems natural and necessary for Robakidze. There is no aggression against the enemy. We are more likely to see a picture of devotion and self-sacrifice, than

the image of a specific enemy. The characters in the novel are ready to do any thing to protect their homeland, even if the disastrous results are clear in advance. Grigol Robakidze untiringly emphasizes the beauty of the homeland, its nature, beautiful people and the talent inherent in these people. An unusually beautiful language tells us about the fidelity and brotherhood peculiar to the Caucasians, their hospitality, respect for elders, superplatonic attitude to a beloved, a unique understanding of the phenomenon of the enemy, blood, birth and death. We can confidently say that all the above should certainly be interesting to both European and non-European readers.

Conclusion

The mental-intellectual world of any thinker is based on his philosophical, social and cultural consciousness. In the case of Grigol Robakidze, this opinion acquires special significance, since he was an outstanding figure of the beginning of 20th century in the field of Georgian literature: he had a brilliant European education and a comprehensive knowledge of Georgian culture. Based on this, Grigol Robakidze developed his own attitude to Georgian culture and especially to literature. This attitude is solid, systemic.

Therefore, his assessments of current trends in the field of Georgian culture and especially in the field of literature, both at the level of his deep knowledge of European literary-critical or general aesthetic concepts, are of particular importance.

Grigol Robakidze never lost his spiritual connection with his homeland, he always devoted to it: "If there is something good in me, it is only thanks to Georgia; ...it is felt and manifested in everything. The Georgians represent a universal phenomenon, it is a small nation with a tribal, united, common soul: its land is a sacred "mother", its ancient history, which has been gathering a living memory for millennia, is the essence of Georgia, manifested in the Georgian character, the Georgian word, the Georgian customs, the Georgian sword, the Georgian song (dedicated to the gods)", wrote Grigol Robakidze in 1933 (Sharadze 1991, 206).

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Georgian Historians and the Ideological Confrontation Between East and West

Abstract: *The work, on the one hand, highlights the mission of Europe, as an importer of knowledge, which has for centuries been the center of gravity for the whole world, and, on the other hand, the role of the Black Sea Region, as an important part of the Great Silk Road, which had also for a long time been promoting the process of rapprochement and exchange of cultural values between East and West peoples, until it became the 'inner lake' of the Ottoman Empire, and today it reverts the function of rapproching and connecting civilizations. The article shows the importance of the Black Sea countries in maintaining overall European stability and in this context the role of historical science. On the backdrop of the ideological confrontation between Georgian historians being inside and outside the Iron Curtain, which began with the foundation of the Soviet Union, the research sheds light on the merit of the Georgian scholars-in-exile for both popularization of the Georgian culture and science in Europe and for importing advanced (European) scientific knowledge to Georgia. Exchange of knowledge in science and culture between the Black Sea region and Europe will enrich and complete each other through impact and each of them will have unique, inimitative features.*

Key words: *Black Sea Region, exchange of knowledge, Soviet epoch, ideological frontier, scientists-in-exile.*

Introduction

For centuries, Europe has been a center of gravity for the whole world. It was a model of political, social and economic progress. In this matter, the role of the Black Sea was tremendous, which promoted the exchange of cultural values and the process of mutual rapprochement and understanding of the peoples of the East and the West. Exactly the Black Sea was an important part of the Great Silk Road. Starting from the city Xi'an, China, in the second century BC., the Great Silk Road, passing the

countries of Central Asia and the Caucasus, through the Black Sea ports, was going to Europe and ending in the center of the Eternal City of Rome, the center of the world of that time. Abdaladze notices out: 'In order to imagine obviously, in particular, what kind of amplitudinous phenomenon we deal with while talking about the Great Silk Road, we should notice out that in the 10th – 12th centuries, when trade was no longer of maximum intensity... the volume of goods turnover of the East production, imported into Constantinople through the Black Sea ports, constituted the equivalent of hundreds of millions of US dollars annually' (Abdaladze 1999, 13).

After the great geographical discoveries of the 15th – 16th centuries and the conquest of Constantinople by the Ottomans in 1453, the Black Sea lost the facilitating function of the process of mutual rapprochement and exchange of the goods between the East and the West. It soon turned into an 'internal lake' of the Ottoman Empire, encircled from every side. After strengthening of the Russian State and capturing the Azov castle by it in 1696 and then the Crimean Khanate in 1783, Russia became a rival of Ottoman Empire on sole possession of the Black Sea. In the 18th-19th centuries, the Russian Empire first acquired the right on the trade navigation in the Black Sea by force of arms, then expanded its domains in its water area and shared the status of the Black Sea Owner State with Turkey for a long time. The centuries-long attempts by Georgian Kings to establish a close military-political alliance with Europe have failed because of the indifference of European leaders. European states' interest in the Black Sea, the Bosphorus, and the Dardanelle's Straits emerged in the 19th century and they tried to secure their positions in the region by diplomatic or military means.

The emergence of independent states in the Black Sea region in the 1880s (Bulgaria, Romania) and 1920s (Ukraine, Democratic Republic of Georgia) did not alter the balance of power – due to the military superiority of Turkey and Russia and their strength compared to other countries in the region, their monopoly was maintained on the Black Sea. Thus, for centuries, the Black Sea more represented a threat to Georgia than a means of communication with European advanced civilization.

Research Methods

In the given paper, I examine a number of historical documents, scientific literature and epistolary legacy of the 19th – 20th cc. Georgian historians.

Discussion

The European Mission and the Role of the Black Sea Region

At present, the Black Sea region, as a strategic bridge to connect Europe with the Caspian Basin, Central Asia and the Middle East, represents an important point in connecting Europe, Southeast Asia and China. It is to some extent a part of the European Union and geographically, it is largely a European sea. Accordingly, Western Europe and the Black Sea region face the common challenges and have common opportunities from the view point of security. Their main interest is to ensure peace, democracy, security, stability, regional cooperation and sustainable development in the region (European Parliament resolution... 2011).

Today, the Black Sea reverts the function of bringing civilizations together. Considering that in the face of modern globalization, the same economic and political centroid gradually moves from the West, the Euro-Atlantic space, to the East, the Asia-Pacific area, the role of the Black Sea region as a link between the West and the East becomes even more important (Regional cooperation... 2014).

The mission of the Europe is tremendous. Western Europe is much more than just a geographical notion or territory. In light of what is happening in the Middle East today, we should remember that it is no longer the time when nations and states had been quietly, indifferently, or, at best, ‘anxiously’ watching neighboring processes.

It is clear that the end of the Cold War imposed more responsibility on European civilization. Today, processes far beyond its borders are reflected on it. For example, the emergence of large numbers of refugees in Europe, as a result of war, conflicts, socio-economic conditions in the Near East and Asia, has led to disintegration processes within Europe, among other difficult issues, with all difficulties that no one knows where to lead a once peaceful and stable Europe. The issue of refugees is faced by the civilized Europe and is a result of ineffective and inadequate policies pursued by the civilized world. It is worth to mention here the statement of the Head of the International Monetary Fund, Kristalina Georgieva, made on January 17, 2020. According to her, inequality and instability of financial sector may turn back Great Depression: ‘This troubling trend is reminiscent of the early part of the 20th century – when the twin forces of technology and integration led to the first Gilded Age, the Roaring Twenties, and, ultimately, financial disaster. .. So we have to learn the lessons of history while adapting them for our times. We know that excessive inequality hinders growth and hollows out a country’s

foundations. It erodes trust within society and institutions. It can fuel populism and political upheaval' (Georgieva 2020).

The Cold War had different problems, the current situation has another ones I would say more severe for Europe, which the European bureaucracy does not understand at the proper level, although the answers to them have been given by the historical past, which is reflected in many academic publications of historians and which must be taken into account.

The importance of Europe was well comprehended by Georgian scientists. The 19th century Georgian historians were progressive-minded who realized Europe's role and place well in the process of the world development. They profoundly understood the importance of introducing Georgia's history and culture to Europe. In this respect, Platon Ioseliani's relationship with the prominent French Kartvelologist Marie Brosset is remarkable. Ioseliani greatly appreciated his appearance in the Russian Academy of Sciences and his scientific effort in presenting Georgia to Europe and helped him with his occupation: sent antiquities, found in Georgia, documents, old coins, everything which had scientific value. By processing antiquities, he perfectly saw the Georgians' place among the world's peoples, and wanted Europe and the world to know that 'the Georgian nation has not stayed motionlessly'. In one of his letters, Platon Ioseliani hopes that Europe in case of getting to know the Georgian writing, will pay attention to Georgia too (Gigashvili 2019).

In private letters, we find interesting information about exchange of the opinions between Georgian, American, and European scholars on the historical issues, about their close collaboration, business relationships aiming at establishing the historical truth on certain events. Interesting in this regard is the letter of the Georgian historian Dimitri Bakradze to Marie Brosset, dated to October 30, 1876: 'I have just gotten Maspero's book issued this year entitled 'The History of the Peoples of the East.' According to it, the question of the Georgians' origin from the Turanians has been already resolved. The author relies on Lenorman's view you have already expressed your consideration about (Collection d'Hist, Armen, t. 1, p. 281). How easily even the best scholars of Europe make mistakes when they digress from the strictly scientific path' (Gigashvili 2019, 126).

The relations between Georgian and European historians is proved by scientific effort of Sul Khan Baratov. He attracts our attention as the first Georgian historian who attempted to apply the concept of European historiography towards the history of Georgia (Natadze 1943, 3). He ex-

amined the Georgia's past in the light of world history, first in Georgian historiography, matched the periodization of Georgian history to that of world history by dividing it into ancient, medieval and modern history, which proves that he was familiar with the works of European historians.

The Ideological Frontier

From a geographical point of view, the ideological frontier initially passed on the Black Sea. Out of the Black Sea region's six countries, in the 1920s, Ukraine, Russia and Georgia appeared on one side of the barricade, while Bulgaria, Romania and Turkey appeared on the other. In just a quarter of a century, the Black Sea Region, except its southern part (Turkey), actually fell into the sphere of Soviet influence after occupation of Bulgaria and Romania. The confrontation between the Soviet Union and the West embraced everything, including all branches of science, though it was acutely reflected on historical science. Since Georgia became a part of the Soviet Union from 1921 after its violent sovietization, the development of science, in general, and historiography, in particular, in the Soviet Socialist Republic of Georgia, was linked to the Soviet system. The Soviet Communist authorities created their own historiography, which was in line with the theoretical legacy of Marxism-Leninism (Kveselava 1999).

It was very curious to demand from the scientist living and working in the first half of the 19th century to investigate the history of Georgia from the perspectives of Marxism-Leninism in the 1930s. While evaluating the scientific occupation of the 19th century scientist Sulkhan Baratov, Soviet historian Grigol Natadze wrote in 1934: 'The historians of the nineteenth century ... were far from the truly scientific historiography created by Marxist-Leninist methodology' (Natadze 1943, 1). The same situation was in the case of the famous Georgian historian Ivane Javakhishvili. In a letter to the Georgian scientist Varlam Topuria on 12 April 1936, Javakhishvili wrote: 'Rector Oragvelidze made a 3-hour speech at University trying to assert the inappropriateness of all my works because they do not follow Marxist methodology which was no new discovery' (Javakhishvili 1987, 168). It is clear, that scientific production created within such an approach was far from science.

After forced occupation of Georgia by Soviet Russia and due to the soviet ideological press, the certain part of Georgian scientists emigrated abroad. They continued their contribution there and tried to exchange knowledge and culture between Georgia and Western Europe. In this regard, the work of the Georgian historian Ekvtime Takaishvili in France

is extremely valuable. His knowledge horizon significantly increased because of his links with European scientific circles and archives. Despite the immigrant's heavy burden, he stayed in the service of Georgia. He delivered the lectures on Georgian history and archeology in French archaeological and linguistic societies, introduced Georgian culture to French society, promoted it, searched for, collected and defended Georgian manuscripts, precious pieces of Georgian art scattered throughout Europe. At the National Library of Paris, he found many ancient Georgian manuscripts, deciphered them, and published the works in Paris: 'Georgian Manuscripts of the National Library of Paris and Twenty Georgian Secret Signs' and 'Georgian Antiquities with European Ones'.

A prominent representative of Georgian emigration was Rafiel Ingilo (1886-1966). Along with other Georgian immigrant historians, he provided the European community with remarkable accounts of 'Georgian statehood, its political orientation, the peculiarities of the spiritual life of the Georgian nation, and the ways of its development' (Chumburidze 2008, 179). He appealed to the Georgian people to relationship with Europe, which he thought was the only way for liberation from Russia.

Mikhako Tsereteli (1878-1965), a prominent Georgian scientist, contributed a lot to establishment and strengthen the Georgian-European scientific relations. His letters of epistolary genre provide important information about Georgia and Europe of the 1920s. In a letter dated to 20 June 1920, sent to his teacher Karl Bezold, prominent orientalist, researcher of Semitic languages and culture, Professor of the University of Heidelberg, Mikhako Tsereteli speaks about the importance of introducing European scientific achievements to Georgia and inviting European scientists to Georgia: 'Our university has been organized quite well. If we stay alone, we are planning to arrive in Germany to bring young German scientists to Georgia. So far this is impossible.' (Megrelishvili 2017). It is difficult to disagree with the discoverer of these letters, Ketevan Megrelishvili: 'While reading these letters, we are getting obsessed by feeling of hopelessness. Mikhako Tsereteli's passion and aspiration to establish the same scientific standards in Georgia he got familiarized with in Europe and to conduct scientific work on a proper level, failed. His fate and unfulfilled scientific work in Georgia seem to be paradigmatic for the Georgian reality – the existing theoretical knowledge about in which direction the society should develop, on the one hand, and consistent hindering circumstances to realize all this practically' (ibid).

A known representative of Georgian emigration, historian, public and political figure Tite Margvelashvili actively participated in the

strongly anti-Soviet activities of Georgian emigration. 'Tite Margvelashvili's life was linked to these two countries: his spiritual world was defined by the Georgian and German cultures as his destiny – by two 20th-century totalitarian regimes: Soviet Bolshevism and German Nazism. While living in Georgia, he endeavored to disseminate German culture and experience (through publicist letters, public and political activities), and while being in emigration – to protect Georgia's interests and inform the German society about Georgian history and culture' (Margvelashvili 2017, 12). Anna Margvelashvili's words can be applied not only in relation to Tite Margvelashvili, but also to all Georgian immigrants, especially those who were educated in Europe, loved European life and wanted to implement it in Georgia.

The joint effort of the European and Georgian historians to restore historical memory of 20th century Georgia is great. The return of the archive of the Georgian Democratic Republic's (1918-1921) Government from abroad indicates to the cooperation of prominent representatives of Georgian emigration with Western colleagues. Though the attempt to return the Georgian Historical Archive from Paris to Georgia in 1972 failed. Ilia Tabagua names the cause of this failure – discordance between the Georgians lived within and outside Georgia (Tabagua 1996, 52). I believe that the reason of this mistrust was the ideological boundary dividing the Georgians of the 1970-s into two parts, including scientists, being inside and outside the Iron Curtain. The member of the Archive Commission Noe Tsintsadze had stated at the meeting that it was too early to talk about returning the archive to Georgia that they would not have brought it in Tbilisi because it would have been confiscated in Moscow (Tabagua 1994, 256).

Because of such distrust between them did not allow Professor Ilia Tabagua was not allowed in 1976 to access to the Georgian National Archives kept at Harvard University since 1974 (Tabagua 1996, 53).

However, there were particular cases of cooperation between Georgian scholars being on both sides of the ideological frontier about Georgian treasure. A striking example of such cooperation is the letter of Ekvtime Takaishvili, dated to April 9, 1935, to a well-known Georgian linguist and Rustvelologist, Professor Vukol Beridze: 'Things must be returned to their masters –the museums of Georgia. Please submit this letter to the authorities of the Georgian Republic, all interested museums, and institutions in order them to present your solicitation as fast as possible..' (Takaishvili 1935). Unfortunately, the national treasure was not returned to Georgia at that time. There exist opinion that Vukol Beridze

had secretly informed Ekvtime Takaishvili that it would be premature (Takaishvili, Letter to...) The return of the national treasure to Georgia took place in April 1945.

Because of ideological boundaries, the return of the Paris Archive to an independent Georgia in December 1996 was not easy. There were serious obstacles that were overcome with great effort (Sharadze 1998, 203). The impact of the Iron Curtain was still great.

The article 'The History is sold' by Amiran Avaliani, secretary of the Institute of History, Archeology and Ethnography of the Georgian Academy of Sciences, published in the newspaper 'Communist' on 15 March, 1986, is inspired with ideological influence and false information. The author tendentiously and by obvious falsification of the facts discusses how the National Archives of Georgian History got in the hands of the anti-communist scientist R. Pipes. Avaliani misleads the readers by accusing a prominent scientist of buying the archive 'by illegal law, by no right' (Avaliani 1986).

The real situation was different. Richard Pipes, a prominent American historian and political scientist, a Harvard University professor, a world-renowned sovietologist, was one of the initiators and supporters to keep Archives of the Democratic Republic of Georgia's (1918-1921) at the Harvard University Library free of charge in 1974. Previously, these materials were stored in the building of the French National Archives, where due to lack of funds there were no facilities available for the care and protection of the archive. Victor Khomeriki, the well-known representative of Georgian emigration, Chairman of the Archives Committee of the Government of Georgia wrote: 'With the unselfish help of Pipes, all the damaged documents were cleaned, restored, microfilms were taken, which required a great expense and Pipes made the University pay for that' (Khomeriki 1987, 94). Thus, through the joint cooperation of Georgian and foreign scientists, the National Archives of Georgia survived and returned in 1996 to already independent Georgia without which it would be impossible to research the 20th century history of Georgia.

Due to the pressure of dictatorial ideological policy, a number of issues in Georgia were examined tendentiously, in a pro-Russian and Marxist-Leninist perspectives. This is especially true when studying the issue of Russian-Georgian relations. Georgian historians working in the West were able to freely express their views and opinions. In the West, objective works reflecting Russian-Georgian relations were created after the Second World War. As an example, we can name Al. Manvelishvili's work 'Russia and Georgia', the first volume of which was published in

Paris in 1951 and which ‘successfully filled the great gap in our historical science of the Soviet era’ (Nikoleishvili 2007, 271). The scientist presents Russian-Georgian relations in the light of the relevant international situation and offers important assessments not only in the context of Russian-Georgian relations, the consideration of which is still relevant today from the viewpoint of the relations between the Black Sea region and the rest of Europe. Getting familiarized with this work, allows us to conclude that development of Georgia, as well as of the entire Black Sea region, was greatly influenced by its place in the international trade relations. ‘It was the meeting place of the two countries: it connected the West to the East ... The main East-West road leading to India passed through Georgia’ (Manvelishvili 1951, 13). When the region was actively involved in international trade, the country was developing, otherwise there was a setback.

Equipped with true knowledge, Georgian historians, influenced by Western science, have produced numerous in-depth scientific works. Western Europe, as a space, free from ideological pressure and colonial relations, helped the countries of the Black Sea by creating objective historical studies. Consequently, the benefits of the Black Sea countries are obvious. At the same time, Western Europe also enjoys the knowledge of our history: as this region largely contributes to the security and peace of Western Europe, equipped with the knowledge of historical processes developed in the countries of the Eastern Europe, it will meet the expected threats ready. The importance of one of the countries of the Black Sea region, Georgia, for Europe, was emphasized by Georgian writer Grigol Abashidze in a small book written in 1958 – ‘Days Abroad’. He explains the beauty of the Western European cities by the fact that the heroic Georgians stood as a protective wall against the striving of destructive forces of the East for Europe and were ready to sacrifice their lives to defend European civilization (Brisku 2017).

The Georgian people have century-old experience of relationship with surrounding world: they adopt from foreign culture only useful features and do not whisk with it. It is worth remembering here the Georgian historian Dimitri Bakradze, who admires the achievements of European science but does not blindly repeat the postulates of European science (Gigashvili 2019, 126).

A clear example of the preservation of one's own culture is the existence of national communities abroad. The emigrated Georgians created a peculiar ghetto by the establishment of Georgian communities abroad to protect themselves from cultural shock. ‘There are four possibilities

for overcoming cultural shock in scientific literature. One of them is ghettoization. At this time, the emigrated people relate to each other and form inside a new, isolated (ghetto) enclaves for their culture, where they preserve and maintain traditions, models of their cultural behavior' (Gotsiridze and Gigashvili 2017, 18).

Through their communities, the Georgians have maintained ties with each other abroad and with their national roots. At the same time, their occupation provided some service to the new homelands. Famous American statesman, New York Mayor in 1959-1974, Nelson Rockefeller, highly assessed American Georgians: 'We, Americans, are proud that many Georgian refugees got refuge here. ...Georgians are important contributors to the growth of the American economy and culture' (Sharadze 1998, 234-235).

In the 1950s, New York City Mayor Robert Wagner addressed to Georgian Diaspora in America: 'I am happy to greet you and notice your knighthood in trying to preserve the ancient traditions of your nation. There are very few countries that have a twenty-three century civilization like yours'. (Sharadze 1998, 235). 'These individuals, as a result of the twentieth-century political upheavals, seemed to be out of history, but worked tirelessly for Georgia's interests where they had to be willingly or forcibly,' – Anna Margvelashvili wrote in a preface to one of her papers (Margvelashvili 2017, 9).

Conclusion

Based on the analysis of research material we can conclude that exchange of knowledge in science and culture between the Black Sea region and Europe will not constitute a subgroup of more general cultural exchange but will enrich and complete each other through impact and each of them will have unique, inimitative features. However, they need the time to influence on each other on the backdrop of stable development.

As a result of today's technological advances, the world, in general, and Europe, in particular, have been so reduced that the event occurred in it affects the entire geographical area and threatens the peaceful development of the world. Europe is, first, an important springboard for the dissemination of knowledge, which is supported by its economic strength and a high level of education. It must thoroughly fulfill this role and the Europeans, especially elite, the official apparatus, and the high-ranking officials must undertake this responsibility and act purposefully for the common prosperity.

Belonging to the Black Sea region creates the favorable conditions for Georgia to fulfil the Western ambitions. Georgia has always been committed to the core European values: humanism, tolerance, religious freedom, equality of men and women, property integrity. Western Europe should pay particular attention to relations with countries for which the idea of integration into the West is not merely foreign but a choice of people with its mentality, dependence on the European values system, and tolerance. As the research shows, the Georgian scientists-in-exile contributed a lot to transferring and implementing the European achievement and values in Georgia and in introducing the rich Georgian history and culture to Europe.

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Натадзе Г., 1934. Сулхан Баратов как историк Грузии, Тб. [Natadze G. Sulhan Baratov kak istorik Gruzii]

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The Institutionalization of the Bulgarian Circus between 1944 and 1957

Abstract: *This article analyzes the process of institutionalization of the Bulgarian circus between 1944 and 1957. The appreciation of circus as “an equal member of the large family of socialist arts” was rooted in a belief that it was a democratic spectacle which transcended social divisions and classes. The source of the perception of the circus as an instrument of social change can be traced to pre-war Soviet tradition, when the circus became not only a tool of state cultural policy, but also inspired the most important creators of literary and theater avant-garde. In post-war Bulgaria, in order to improve the quality of performances, interinstitutional cooperation of the circus with literary and theater circles was initiated, and with the purchase of circuses by the state, numerous regulations were introduced in the profession of a circus artist. This purchase was not synonymous with nationalization: the state bought the circuses from the hands of their pre-war owners, allowing them to continue to perform strategic functions in the circuses.*

At the same time, despite deep institutional changes, the circus after 1944 maintained its semi-peripheral status of an entertainment spectacle, not worth considering on the part of intellectual elites and unfit for the project of national high art. It is this peripheral potential of the circus as a spectacle not shaped by the refinement of the elites, that opens up new research perspectives which allow us to view the circus as a laboratory of social and cultural change. As a nomadic travelling institution, the circus crossed geographical boundaries and communicated with viewers from cities and villages, as well as representatives of various social groups and strata. On the other hand, multiethnic, international environment of the circus was a space for intensive transfer and intercultural dialogue, both in the artistic dimension and in the sphere of everyday interpersonal practices.

Key words: *circus, People’s Republic of Bulgaria, cultural policy, spectacle, theater, institutionalization.*

The place and status of circus in the world of spectacles underwent changes throughout the ages. Medieval anchorites believed it to be a dev-

il's work, Tertullian called it "the temple of all demons", and disciplines described in modern times as pertaining to the circus existed on the periphery of culture as barbaric spectacles with potentially destabilizing effects on spiritual life (Sznajderman 2014, 88-89). Traveling artists presented plays in the open air, mainly in meadows outside the city and on market squares. In the late Middle Ages and the early modern period, in traveling troupes there were many people without land, property, independent of the feudal class, who fled from flood, fire or court judgement; others were impoverished burghers, soldiers, craftsmen, stallholders and beggars. They were met with hostility by the members of stabilized social strata because their life patterns differed from those generally accepted by these communities (Siedlecka 2017, 314-315). The disciplines themselves, today collectively called circus disciplines, had much deeper roots than the institution that has been encompassing them since the end of the 18th century, known as the circus. Most circus artists considered the arena a possible, but not necessary place for the presentation of their own work, because in the 19th century the circus tent gathered, usually temporarily, people who had been present in the world of spectacles for centuries: acrobats, tightrope walkers, comedians, musicians and magicians (Cihlár 2006, 14-15).

As Yordan Demirev writes (1988, 183-184), the origins of the Bulgarian circus should be sought in the traditions of **funfair performances** which were popular since the mid-nineteenth century. During fairs and indulgences, traveling artists presented fighting shows, lifting heavy bags with stones, and eye-catching, tension-building horse racing. Particularly popular pastimes also included tossing and manipulation of *gegi*, i.e. mace-like shepherd's sticks - these performances resembled a circus juggling. The performers, originating from villages, were often shepherds, whose *gegi* were used for self-defense, so this peculiar juggling came from practical skills, trained during cattle grazing on potentially dangerous high mountain routes. The fairs also featured the so-called ***karag'ozchii***, i.e. wandering actors, especially popular after the liberation of Bulgaria, who performed puppet shows, magic arts, comic scenes, and knife throwing for remuneration in kind, for example food; otherwise they collected money to a hat after the performance. In the book *Circus throughout the Ages*, it is written that it was *karag'ozchii* who were the first professional circus performers, and their popularity would be evidenced by the fact that when the National Assembly discussed the issue of subsidies for the capital national theater in the young state of Bulgaria, MP Smochevski cited the example of these artists: *When, in a few years,*

we grow rich, I'm ready to give ten thousand or even more, not only to the theater, but also to (...) karag'ozchii (Demirev 1988, 187). This quote also brings out the special ambiguity associated with the perception of the circus in the late 19th century, and later in the 20th century, by cultural institutions, as well as by intellectual and artistic elites, who saw it at most as a “worse” form of art or an entertainment spectacle which, even if visited by the upper echelons of society, was unworthy of a deeper reflection. One of the exceptions in this respect was Ivan Vazov, whose journalistic writings from 1893-1895 contain records of visits to the circus (Vazov 1956), and the short story *Salomonovskiyat tsirk* from 1888, based around the theme of athletes' fights, shows that the writer was aware of the artistic potential of the circus.

A professional circus with an arena came to Bulgaria in 1866 thanks to the Italian Pizzi family. In the 19th century Italian families, recognized alongside Russian families as the most outstanding in European circus art, popularized the circus not only in Bulgaria, but also in other European countries (the first Polish stationary circus was built in Warsaw in 1866 by the Ciniselli family). Bulgarian or Polish territories however were not the final destination of the Italians who came here by chance, so to say along the way, running between the main circus “capitals” – Paris and Moscow (or Saint Petersburg). In Sofia, Angelo Pizzi set up his circus on Trapezitsa Square and with the help of a team of engineers building the Sarambey-Constantinople railway at that time, the Italians constructed a wooden barrack, heated by stoves in the winter season (Atanasov 1967, p. 63). **In 1897 the circus *Bulgarian Banner* (full name: *Gymnastic Acrobatic Group Bulgarian Banner*), founded by Bulgarian Petar Panayotov, began its operation.** After several years spent in the Pizzi's circus as an “errand boy” and after that having practiced in several foreign circuses, Panayotov decided to start his own circus (Goldstein 1940). Although the *Bulgarian Banner* is recognized as the first Bulgarian national circus, its “Bulgarianness” demands definition, just as the circus research itself demands the extension of the national key criteria. The circus in its long history was a mobile, transnational institution, and circus groups were usually international and multi-ethnic. The artist Lazar Dobrich writes about it in his autobiography, recalling his first visit to Petar Panayotov's circus in 1897 during which the gypsy brass band from Lyaskovets performed live (Dobrich 1973, 9). Some of the foreigners worked in the circus temporarily, others permanently, getting married and having children of dual citizenship, as in the case of the Balkanski family of Bulgarian-Italian origin. Back to the *Bulgarian Banner* circus,

along with Panayotov, it was founded by Ahmed Aga, at the time the greatest of **ip-dzhambazi**, i.e. **tightrope walkers**, and his three sons working in the same profession. Some sources mention Ahmed Aga as a Bulgarian converted to Islam, others as a Turk. Lazar Dobrich wrote about the ip-dzhambazi as late as 1958, that they were of Turkish or Armenian descent, they referred to ancient eastern traditions of tightrope walking in their craft, and especially many of them appeared in Bulgaria at the end of the 19th century (Dobrich 1958, 9). But as early as 1988, Yordan Demirev corrects Dobrich's recollection writing about Ahmed Aga as a Bulgarian converted to Islam in his book *Circus throughout the Ages* (Demirev 1988, 190), in line with the popular nationalist rhetoric against the Muslim minority at the time, which described this minority as indigenous Bulgarians who were converted to Islam by force during the Ottoman rule.

In the interwar period, circus life in Bulgaria became financially and institutionally stable. Family members were circus managers, as in the case of the Sofia circus *Bulgaria*, but not always their owners, as in the capital circus *Colosseum*, managed by brothers Aleksandar and Lazar Dobrich, owned by entrepreneurs associated in a joint-stock company. From the late 19th century and in the first decades of the 20th century, many artists came to Bulgaria from abroad: Japan, Romania, Czechia, Hungary, Austria, Germany, the Soviet Union, and Bulgarian artists began to travel: first to Turkey, Greece, Yugoslavia and Romania, and then to largest circuses in Germany, Austria, the Scandinavian countries and France (Demirev 1988, 259). In 1931 the first circus organization was established: *The Bulgarian Circus Art Organization*, bringing together artists and circus and entertainment company owners. In 1933, it began publishing the *Tsirkov glas* journal, which discussed the role of the circus in the world of spectacles, as well as current issues related to the circus community. The 1930s was a period when various projects of circus associations were created – one of them was the cooperative model. When *The First Bulgarian Cooperative Circus* was founded in 1933, the short-lived journal *Arena* became the voice of the organization. In the manifesto published in the first issue of the journal Lazar Dobrich postulates Europeanization of the Bulgarian circus, by which he meant raising the standards of Bulgarian circuses and, thanks to the exchange of artists with European countries, the inclusion of the Bulgarian circus into the European circuit of circus culture. As a well-known artist with many years of work experience in the world's largest circuses in Europe and the Americas, Dobrich also considered establishing a professional enter-

prise in Bulgaria modeled on the circuses whose structure he came to know abroad. However, Dobrich's plan was unsuccessful, and the community's reluctance was especially aroused by the plan to include foreign performers, in which Bulgarian circus performers saw competition for domestic artists, especially in the winter season: circus artists willing to perform in cabarets during the "dead season" were eliminated by more competitive foreigners. Thus, a cosmopolitan institution which was the circus in the first decades of the 20th century until around 1918 became much less open to foreign artists in the 1930s, which undoubtedly contributed to extending the field for domestic circus artists, but also stopped many inspirational cultural flows.

After the Second World War, when the Bulgarian circus entered its third phase, the state ownership of circuses became the key change. *The Bulgarian Circus Art Organization*, incorporated in 1937 into the Union of Bulgarian Artists was renamed after the war to the *Circus Art* section of the Union. Shortly after the war, several competing projects of the development of the Bulgarian circus emerged. Lazar Dobrich put forward one such idea, proposing the organization of cooperative circuses, involving close cooperation of 3-4 circuses, or (following the example of one of the Swiss circuses) the establishment of an enterprise that, thanks to high profits, would only partly benefit from state subsidies. Due to the adoption of the new constitution in 1946 and the definitive proclamation of Bulgaria as a people's republic, these proposals were not accepted and by the decision of the **Committee on Science and Culture in 1948 the circuses were purchased by the state**. This, however, was not the same as nationalization, as the state bought the only four circuses remaining after the war (*Rodina, Globus, Bulgaria* and *Republika*) from their former owners. An artistic council was appointed for each of the circuses and the members of circus families continued to perform key functions in them, accepting the circumstances related to the new cultural policy of the state.

The third period of the Bulgarian circus' existence can be closed in 1957, when the Bulgarian circuses were consolidated and became self-financed, which meant the abandonment of the state subsidy of 90,000 leva per year. The motives for the circus reform were laid out in the letter from the successor of the head of the Art Department, Angel Budev, to the Minister of Culture, in which the need for central management is motivated, among others, by competition between circuses, fragmentation of artistic programs and derivative programs. Budev proposed to create a state-owned enterprise called *State Circuses*, which

would manage the artistic and administrative affairs of all four circuses (Tsentralen Darzhaven Arhiv, Sofia, Tsirk Republika, box 277, fond 1, folder 29). The establishment of a circus enterprise in 1957 began a new stage, related in particular to expanding the field of the circuses to abroad. Bulgarian artists began, individually and with entire artistic programs, to perform in 20 countries and on 3 continents, including the USSR, the United States, Israel, Hungary, East Germany, Czechoslovakia, Romania, Greece, Yugoslavia, Turkey (Atanasov 1967, 69), and thanks to favorable foreign-exchange contracts, they not only sustained themselves, but also contributed to the state budget (the touring artists themselves received fairly low fees as state employees compared to the profit their performances brought to the state).

It is the years from 1944 to the establishment of the unified enterprise *Bulgarian Circus* in 1957 that constitute the main subject of this article. At this time Bulgaria saw **new attempts to determine the place and status of the circus in the world of spectacles**. Such discussions had taken place before, but after the war they returned in a changed geopolitical situation that determined their form orienting many of the ideological choices in the perspective of the new order and placing the Soviet Union as one of the key reference points for the development of the circus. In the documentation of cultural institutions from this period one can find a lot of discussions on the role of the circus as a democratic spectacle, which thanks to the ability to speak a clear language above classes and aesthetic divisions, was to take on the role of a binder between social groups. On the other hand, key figures of the post-war circus tried to continue many of the concepts which existed before the war, especially those regarding the organization of circus life. For example, Lazar Dobrich abandoned his ideas of cooperatives and the vision of the circus as a capitalist enterprise after the war and became one of the organizers of circus life in socialist Bulgaria, remaining the most influential man of the circus in Bulgaria for years and maintaining close contact with Todor Zhivkov. Political leaders were most probably aware of the social potential of circus performances, as well as the fact that breaking up the organizational structure of the circus, based mainly on multigenerational circus families, could do more harm than good. First of all, there were no staff, other than the families, capable of keeping circus tradition and craftsmanship alive. Secondly, in the still poorly urbanized society of the turn of the 1940s and 1950s, the vast majority of whom were rural residents or new townspeople in the first generation, the family was part of the patriarchal tradition and a guarantee of stability in a changing world, and not – as might

be derived from Marxist logic – a bourgeois institution, non-transparent from the perspective of the state, which created an undesirable barrier between what is private and public. On the contrary - the family became one of the key categories of the People's Republic of Bulgaria, and patriarchal-conservative models became a reference point in the process of creating political communities (Georgi Dimitrov and Vylko Chervenkov; Todor and Lyudmila Zhivkov).

Circus and theater

In the early 1940s, the Bulgarian circus community sought to raise the status of the circus in the eyes of both state authorities and society itself. This was done by promoting the **circus as an educational institution**. In the *Tsirkov glas* journal it was postulated that the state gave at least minimal support by building a stationary winter circus, enabling activity in the “dead season”. One argument for the state support of the circus (the author gives Germany and the Soviet Union as examples of countries subsidizing circuses) is the information that circuses pay fees to the state in the form of excise duties and taxes, they contribute to the development of the Bulgarian railway, but unlike the generously subsidized Bulgarian National Theater and other drama theaters outside Sofia, they get nothing from the state, even though they are much more frequently visited by the Bulgarian audience (*Tsirkov glas*, August 1940, 1).

In 1944 in Bulgaria only 4 drama theaters remained after the war, of 13 still functioning in 1939. After World War II, the number of theaters in Bulgaria began to increase rapidly: in 1948 there were 24, in 1953 – 33, and in 1965 as many as 39 theaters and operas. This increase, however, was not proportionate to the possibilities of providing theaters with development funds, nor did it fill in the shortages of qualified artistic staff and poor management. In minor city theaters, up to 80% of the artistic staff did not have an artistic education (Atanasov 1967, 35). The rapid increase in the number of theaters and artistic and administrative staff was not followed by qualitative changes. Poor management, staff overgrowth, lack of educated artists, well prepared for the profession, in many cases caused the activity of professional drama theaters to resemble that of amateur theaters. Furthermore, theaters accumulated a negligible audience, especially in small cities. The theaters recompensated their lack of audience by performing on tours throughout the country which meant that **theaters often became traveling institutions, like circuses**. That caused both institutions to fight for the viewer and led to various conflicts. The documentation of the *Republika* circus from 1957 includes a

complaint by the assistant manager of the National Theater for the Countryside to the Minister of Culture, related to the violation of professional ethics by circus performers. In the village of Septemvri, where the circus and the National Theater came with performances for residents at the same time, the circus artists first tried to poach the room reserved for the evening by the National Theater, and having failed, they rented space at the train station near the village. Before the theater started performing, they transported viewers free of charge to the circus show. The residents let themselves be persuaded by the circus performers, choosing a circus show over the theater, and after eight rounds the circus had a full audience, whereas the theater performance was a failure due to lack of spectators (Tsentralen Darzhaven Arhiv, Sofia, Tsirk „Republika”, box 277, fond 1, folder 29).

The document *The Successes of the Bulgarian Circus after September 9, 1944*, summarizing the decade from the state purchase of the Bulgarian circus, states that the circus, thanks to its significance and educational effects, was legally established as “an equal member of the great family of arts in the socialist society of the People’s Republic of Bulgaria” (Tsentralen Darzhaven Arhiv, Sofia, Tsirk „Republika”, box 277, fond 1, folder 29). In the light of this equality, the division of spectacles into “high” and “low” became outdated, and at the same time began the process of involvement and artistic transfers, also between the theater and the circus. After 1944, the documentation of contemporary cultural institutions shows a consistent effort **to define the circus as “art”**, and not as an entertainment spectacle that would place the circus closer to sport or shows of physical strength. Like before the war, also here applies the narrative about the role of the circus as an educational tool, promoting positive body models and the strength of human will and courage. However, while before the war this narrative was inscribed in the idea of a “healthy nation” as a potential military and reproductive force, after the war, besides the narrative about “healthy bodies of the nation” and “people’s strength”, emphasis is placed on **the critical potential of the circus linked to the presence of the spoken word, made possible thanks to the genre of clownery**. In this sense, the circus as an institution associated with the word and consciously using the potential of the spoken word, **intercepted certain roles of the drama theater**, while not neglecting the possibilities offered by the language of the circus and the disciplines associated with the circus, such as juggling, vaulting, and equilibristics; special attention was paid to bringing out the full potential of the language of the circus. In order to renew the clownery genre, each circus

was appointed with a playwright from the Union of the Bulgarian Writers, who would work on the clownery scripts. Practice rooms were also provided in the winter season to ensure continuity of rehearsals. The perception of clownery in post-war Bulgaria derived from the experiences of pre-war Soviet circus satire, created by both the most outstanding poets like Vladimir Mayakovsky, and unprofessional authors who based their comic scenes on simple situational humor rebuking class enemies and social inequalities. Soviet inspiration intensified in Bulgaria after 1952, when the first delegation left for the USSR, starting official cooperation with the Soviet circus. According to the new look at the clownery, artists of this genre were to become not only virtuosos of the word, but also great acrobats, jugglers and gymnasts, synthesizing the possibilities of bodily expression with the dramaturgy of the spoken word. They played a certain type of character, based on the figure of Ginger, i.e. a red clown originating in folk imagination. The clumsy Red Clown with a flexible body and a red wig on his head was supposed to express the voice of the people and the folk culture of laughter. He was sometimes paired with a subtle and melancholic White Clown (who was not, however, very popular in the Bulgarian circus) (Arđov 1968). An important task of interdisciplinary teams working in the circus was to rid the clowns' acting of manners imitating the performance of dramatic actors, and to make clowns, playing to this point as (unprofessional) actors, return in a way to their roots, i.e. circus aesthetics, based on their own repertoire of means of expression. This way of thinking about the clownery was implemented by the most eminent Bulgarian post-war clown Tosho Kozarev, who was a talented mime, juggler and acrobat, but also a writer and director of circus shows. Playing "folk" heroes in the arena, he employed a figure known in the Bulgarian imaginarium as "Clever Peter", i.e. a smart Bulgar, who thanks to his intelligence can often outsmart potential enemies of a higher social and economic status. Kozarev also performed modernizing scripts in the arena, for example transforming into an astronaut who, along with his trained dog, would get into a rocket to fly into space, as a reference to the Cold War space race between the powers of the East and the West.

Circus families

In Bulgaria, the tradition of family circus model date from the late 19th century and it exists to this day in the activities of families such as Balkanski, Pironkov and Dobrich. The organization of the **circus as an institution based on a multi-generational family**, established for centu-

ries, had its pragmatic justifications. If the whole family worked in the circus, there was no need for months of separation during the performance season, and with representatives of several generations present in the circus tent, children could be included in artistic programs from an early age. In the face of economic instability of circus life and exposure to adverse weather conditions, the family model was also a much greater guarantee of continuity of the institution, because in times of crisis family members worked without remuneration, hoping for a better future, while those employed from outside more often left the circus at a moment of weakness to find more stable employment (Sejbuk 2020). I have heard the imperative of having many children from circus researchers and practitioners many times; among them was the owner of the Balkanski family circus, Aleksandar Balkanski, who emphasized that circus families should reproduce, because that is the foundation of the circus' durability; furthermore, thanks to this structure the old can teach the circus craft to the young (Balkanski 2014, Siedlecka 2019, 238). The intra-family flow of knowledge led to the consolidation of the image of circus life as a hermetic environment, especially in the context of practices related to children's education: it was common practice before the war and in the first decades after World War II that circus children, often appearing in the arena, changed schools even several dozen times a year, and as late as the 1960s some of the circus families did not have permanent homes, their only place of residence being the circus wagons. The situation began to change in the late 1960s, when thanks to cooperative housing fixed dwelling became widespread among circus people, and children stopped participating in year-round group tours, staying under the care of older family members, studying in one school and thus not appearing in the arena (Sejbuk 2020).

In Bulgaria, a new generation of young artists, descendants of the first generation of circus families, appeared in the 1930s, although it should be added that belonging to the circus family was not the only way to become an artist in this field. The 1937 article in the *Tsirkov glas* journal entitled *Our Children* describes two paths of a future circus performer. One is that of a child belonging to a circus family, the other is by external recruitment. And although the anonymous author does not determine which of these paths is better, they see more latitude and courage to work in the circus in children from circus families. However, they set the lower age limit for working in a circus to 10 years, as younger children are not only more vulnerable to the hardships of work, but because of the delicate bones they are also much more prone to accidents (Tsirkov glas

1937, 8). Even after World War II child trafficking was common and children from large poor families were often sold to the circus (Sejbuk 2020). Children from orphanages also found themselves in the circus, spotted by circus people as physically predisposed to a certain discipline (Balkanski 2014).

Although after the war, as a result of the purchase of circuses by the state, an important role in the life of this institution was taken over by the official administrative and artistic bodies, **the circus families, to whom the circuses belonged before the war, still played an essential role in managing and creating the artistic program.** There was no other option: the family members knew the complexity of the circus best. Therefore, in the first years after the war, alongside the formal circus manager, the former owners of the circuses were informal managers. In some cases the privileged role of the families caused conflicts in the community. The secretary of the circus trade union at the *Republika* circus Angel Bozhilov complains in his report from August 13, 1950 (Tsentralen Darzhaven Arhiv, Sofia, Tsirk „Republika” 1950-54, box 277, fond 1, folder 4) about unequal treatment of team members and privileged “Italians”, as he calls them, although the Orlando family he writes about was composed of mixed Italian-Bulgarian marriages. The goal of Bozhilov’s text, who presents himself as a former partisan, now a communist, and a “useless” artist of the *Republika* circus due to his advanced age, is to try to change the situation in the circus, where the circus family exercises real power, and the trade unions have a puppet function. Bozhilov states that, even though the director of *Republika* is externally appointed Aleksandar Katsarov, he only does what the family tells him, especially since he is the husband of one of the Italian circus artists. **The text underlines in particular those family practices associated with the former “fascist” order.** The family is supposed to derive real profits from contacts with Italy, they receive from a steamboat in Burgas white bread and tangerines sent from Italy, which one of the Italian family members comments: *See what fascists eat, while you in Bulgaria eat corn* (Darzhaven Arhiv, Sofia, Tsirk „Republika” 1950-54, box 277, fond 1, folder 4). Bozhilov devotes a lot of attention to the issues of poverty, overexertion, and hunger in the circus community, emphasizes the irregularity of salary and the lack of social protection in this risky profession in which physical fitness is “to be or not to be” of an employee. He describes falls from heights during performances, one of his colleagues vomiting blood, lack of medical care and resulting permanent injuries, as well as dismissal of employees who had to stop working in the arena for

health reasons. The disproportion between the “family” and the rest of the team is also visible in working time: while the family plays in the spectacle only once a day, during the evening show, the other artists have even 5-6 performances at funfairs during the day, then two evening performances, which means that their work day often lasts from 9 AM to 2 AM. The fate of “rank-and-file” members of the artistic team was also described in detail: in addition to performances in the arena, they carry out exhaustive technical work in the circus: after dismantling the tent, they take a troublesome night trip to another city in an overcrowded state railway train (the “Italians” travel in comfortable private circus wagons), at dawn they set up a tent in a new city, and then, in a state of exhaustion and after a sleepless night, start another day of performances.

In the 1950 report one can see a clear **polarization of the community into communists who embody new visions of the circus on the one hand, and the “family” on the other**. The exploited “comrades” share food when they are hungry, there is solidarity in them, but also fear of the “family” whose position is still unwavering. In the time when Bozhilov writes his article, the Bulgarian circus is increasingly gravitating towards Soviet institutional and artistic models. Between the lines of the report there is also information not directly related to the circus, which nevertheless affected the form and human resources of this institution, such as collectivization, which resulted in Katsarov, the manager of *Republika*, losing ownership of his estate. **Collectivization**, which covered 60% of all agricultural land during Valko Chervenkov’s time in office, could also underlie the question of to what extent the removal of land from a part of society became the reason for some of them to choose circus life.

The change of circus status and its purchase by the state after 1948 was a blessing for many. The full-time work system regulated numerous issues related to social and medical care, regularity of remuneration, and in the following decades also contributed to the expansion of the educational base, as in the circus facility Iliyantsi near Sofia (and in Poland in Julinek near Warsaw) artists who did not necessarily belong to circus families could improve their craft throughout the year. On the other hand, after the war many artists gave up their work in the circus, perceiving thorough state interference as a kind of restriction that contradicted their idea of the ways this institution operated.

* * *

Despite the declaration of political appreciation in the world of spectacles, the circus after 1944 maintained its **semi-peripheral status**

associated in particular with ambivalent perception of the circus as a ludic, entertainment institution that did not fit into the project of high national art, embodied, for instance, by the drama theater. After the purchase of circuses by the state in 1948 important regulations of circus life were implemented and circus performances were popularized among the public, nevertheless this did not bring about a deeper interest in the potential of the circus on the part of intellectual or artistic elites, for whom circus performances remained a kind of entertainment and “trickery”, not worth a second thought. But if we consider this peripheral status of the circus as a position that offers a new view of cultural phenomena and social mechanisms, the peripherality becomes a factor which opens up new research perspectives. Since the development of the circus was much less conditioned by the refinement of the elites than, for instance, the theater, it allows us to view the circus as a laboratory of social and cultural change. As a nomadic travelling institution, the circus crossed geographical boundaries and communicated with viewers from cities and villages, as well as representatives of various social groups and strata. On the other hand, multiethnic, international environment of the circus was a space for intensive transfer and intercultural dialogue, both in the artistic dimension and in the sphere of everyday interpersonal practices.

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The Patrimonialization of the Communist Past in Romania: Laws, Memorials, and Monuments

Abstract: *The patrimonialization of the communist past in post-communist Romania is a twofold phenomenon: on the one hand, communism was demonized while its victims celebrated as martyrs, and, on the other, it was thrown away to the dustbin of history without comments. The last approach, promoted by neo-communists, was meant to hide the responsibility of their ancestors in perpetrating victimhood upon the Romanian nation. What were their strategies and concrete actions in achieving the wanted results are the main concerns of my article. It investigates how monuments, memorials and museums were instrumental in forging a politicized/ideological suitable image of the communist past. Furthermore, the laws, institutions, commemorative practices and rituals are analyzed in order to see what was at stake in creating them and who were the promoters of the narratives which lead to such creations.*

Key words: *patrimony, museums, memorials, monuments, public policies, commemoration, compensatory laws.*

Introduction

The societal changes of the last decades of 20th century had an impact on the way people bound with their collective past and personal genealogies. Monuments, memorials, museums, and memory centers were created in order to re-enact the lost bond to the community, and thus, to oneself. They became part of a cultural patrimony meant to be preserved, cherished and passed on to future generations.

The cultural patrimony exists “through the reading which it is given by communities and human societies in the present.”¹ It assesses a political stance towards the past. The interpretation of this said past plays an important role in legitimizing the political order. However, the preoccu-

¹ “Introduction”, in Graham Fairclough, Rodney Harrison, John H. Jameson, John Schofield, eds., *The Heritage Reader*, London-New York, Routledge, 2008, p. 3.

pation of a society for its own past does not have solely political purposes, “the impulse to preserve is (also) partly a reaction to the increasing evanescence of things and the speed with which we pass them by.”²

The cultural patrimony can be material and immaterial, both playing an important role in creating identity, being a focal point for longing the lost past, and offering an alternative for a durable development of local communities. Monuments, memorials and museums are important items of the material cultural patrimony. Furthermore, most of them become veritable *lieux de mémoire* (realms of memory, in the sense given by Pierre Nora in his instrumental book, *Les Lieux de mémoire*³). However, the cultural patrimony is not a static set of actions, values, places, personages, etc., but a process, a constant interaction between its promoters and its consumers.

Monuments can be placed in two categories: commemorative and historical. A commemorative monument performs a memorial function while a historical one is viewed as a document with an artistic function meant to promote identity, values and a discourse about the past⁴. Eventually, a memorial function can be added to its various meanings.

A museum is conventionally viewed as an institution dedicated to the conservation of valued objects and to the education of the public⁵, while a memorial is conceived as “an artifact that imposes meaning and order beyond the temporal and chaotic experiences of life”⁶. Museum’s goals are to save, record, and produce cultural heritage⁷. Memorials have a civic utility, performing public service and being used to remember the past and/or to give moral value to the past⁸.

The approach to monuments, museums and memorials has been challenged in the last 30 years, due to the changing functions of these

² David Lowenthal, *The Past is a Foreign Country*, Cambridge: Cambridge University Press, 1985, p. 399.

³ Pierre Nora, Pierre, *Les Lieux de mémoire*, vol. 1, *La République*, Paris, Gallimard, 1984.

⁴ Kazmer Kovacs, *Timpul monumentului istoric* (The Time of the Historical Monument), Paideia, 2003 (hereafter, Kovacs, *Timpul*), p. 43-50.

⁵ Susan Crane, “Memory, Distortion, and History in the Museum”, in *History and Theory*, vol. 36, no. 4, Theme Issue 36: Producing the Past: Making Histories Inside and Outside the Academy, December 1997, (hereafter Susan Crane, “Memory, Distortion, and History in the Museum”), p. 44.

⁶ Yi-Fu Tuan, “The Significance of the Artifact”, in *Geographical Review*, no. 70/1980.

⁷ Susan Crane, “Memory, Distortion, and History in the Museum”, p. 48.

⁸ James M. Mayo, “War Memorials as Political Memory”, in *Geographical Review*, vol. 78, no. 1, January 1988, p. 62.

artifacts and/or institutions. They became more and more commodities, which are consumption oriented, and thus, interested to satisfy their audience. Furthermore, they acquired new meanings by dealing with controversial, powerful human rights' topics like genocide, colonialism, racism, etc.

Based on these theoretical considerations, my article investigates how monuments, memorials and museums were instrumental in forging a politicized and ideological suitable image of the communist past. Furthermore, these artifacts are analyzed in order to see what was at stake in creating them and who were the promoters of the narratives which lead to such creations.

Memory Politics in Postcommunist Romania

Shortly after Ceausescu's execution, on Christmas Day, 1989, those who took power, the second-rang nomenklatura, officers and collaborators of the secret service, the notorious Securitate, the so-called neo-communists, framed a new political order, defined by the first post-communist president of Romania, Ion Iliescu⁹, as an "original democracy". The responsibility for the political failure as well as for the shortages of all sort was assigned to Nicolae Ceaușescu and his wife. Meanwhile, the neo-communists tacitly take upon the communist heritage by controlling all public institutions¹⁰ as well as factories, collective farms, etc., which eventually will be privatized in their favor.

As regards the communist period, the neo-communists aimed at imposing amnesia by encouraging people to leave the past behind and to focus on the present, and the future. However, the existence of a big number of former political detainees and deportees¹¹ hindered the total

⁹ Ion Iliescu, born on 3 March 1930, served as president of Romania from 1989 until 1996, and from 2000 until 2004. He joined the Communist Party in 1953 and he served as the head of the Central Committee's Department of Propaganda and as Minister for Youth between 1967 and 1971. In the late 1970s, he was marginalized by Ceausescu but he held high offices in the province. During the December uprising in Bucharest, he became the leader of the anti-Ceausescu movement. He won the free general elections of May 1990 and became the first post-communist president of Romania.

¹⁰ Alexandru Gussi, *La Roumanie face à son passé communiste*, Paris, L'Harmattan, 2011, p. 45.

¹¹ Cristina and Dragos Petrescu mentioned a number of 100 000 former detainees in 1990s. Cristina Petrescu, Dragos Petrescu, "The Canon of Remembering Romanian Communism: From Autobiographical Recollections to Collective Representations", in *Remembering Communism. Private and Public Recollections of Lived Experience in*

oblivion of the communist past. Organized, they promoted an anti-communist discourse also supported and disseminated by several mass-media outlets and a few civic associations such as the Group for the Social Dialogue¹², The Memoria Cultural Foundation, the “Academia Civică” Foundation, The Association December 21, etc. They endorsed and distributed an anticommunist discourse through debates, protests, civic actions, memorial practices, publications, new institutions and memorial laws. Their anticommunism also became a means of legitimization not only in the political arena, but also in the economic, cultural and social fields of power.

Anticommunism versus amnesic neo-communism defined the Romanian political life until 2000 when the agreement of all political forces to work for Romania’s admission to NATO and UE made it marginal. Anticommunism moved slowly from the political arena to the cultural field of power becoming the dominant paradigm of the public space after December 2006 condemnation of the communist regime by the president of Romania in an official statement assumed in front of the MP's during a plenary session of the Romanian Parliament.

Memorial Policies and Compensatory Laws¹³

The neo-communists amnesia was challenged constantly by the right-wing anticommunism as well as through the private patrimonialization of the suffering of the repressed people. Shortly after 25th of December 1989, the former survivors of the repression, many of them members of the political parties outlawed by the communists, asked for justice to be done, for undoing the communist wrongs, for public acknowledgment of their suffering. This was partially done through the Decree-Law no. 118 adopted on 30th of March, 1990, by the transition government. It granted monthly compensation to former political prisoners, deportees, and POW's, in various amounts depending on the number of years they had spent in prison, camps or deportation. They also enjoyed free public

Southeast Europe, edited by Maria Todorova, Augusta Dimou, Stefan Troebst, Budapest-New York, CEU Press, 2014, p. 57.

¹² The Group for Social Dialogue (GDS) is an organisation established in 1990 by intellectuals and former communist dissidents of the last years of Ceaușescu’s regime. Its goals are to protect human rights and the environment and to promote democratic and civic values. It also focuses on the memory of political persecutions in Romania.

¹³ This aspect was further developed in my article, *Communism as a Frame of Reference in Romania: Public and Private Recollections* to be published in *Sensus Historiae*, 2020.

transportation, the inclusion of the years spent in prison/camps/deportation into the calculation of their old-age pension, etc.

However, the pecuniary compensation did not mean an official acknowledgement of their persecutions. At the beginning of the 1990s, the former political detainees were still depicted as “enemies of the people” by neo-communists¹⁴. This attitude changed only after 1996 when the Democratic Convention, an alliance of anticommunist parties, won the general and presidential elections. New laws were adopted in order to institute or celebrate the resistance to communism.

In December 1999, in order to mark a 10 years anniversary from the Fall of Communism, a decree-law was promulgated, which granted the label of fighter in the anti-communist resistance to all people who opposed communism between 6th of March 1945 (the day of the foundation of the first pro-communist government) and 22nd of December 1989 (the fall of Ceausescu). Former detainees and deportees as well as dissidents were entitled to compensations and restitution of their belongings. The decree-law combined compensatory rights with memorial policies as it proposed to rename streets and squares after anticommunist figures as well as to grant decorations and medals¹⁵. Another law, adopted after the official condemnation of communism in December 2006, Law 221/2009, gave to the former political prisoners the possibility to ask for material compensations as regards their imprisonment¹⁶.

After Romania has integrated the European Union in 2007, new memorial laws aiming at commemorating the victims of Communism and Nazism were adopted under the influence or under the pressure of European institutions. In 2011, the Parliament adopted the Law 198, which declared 23rd of August “the National Day of Commemoration of Victims of Nazism and Communism” as well as the day of 21st of December “the Day of Remembrance of Victims of Communism in Romania”¹⁷. Under the pressure of some vocal groups of former detainees and

¹⁴ Claudia-Florentina Dobre, *Ni victime, ni héroïne: les anciennes détenues politiques et les mémoires du communisme en Roumanie*, Electra, București, 2019, p. 136.

¹⁵ <https://lege5.ro/Gratuit/giztsmbr/ordonanta-de-urgenta-nr-214-1999-privind-acordarea-calitatii-de-luptator-in-rezistenta-anticomunista-persoanelor-condamnate-pentru-infractiuni-savarsite-din-motive-politice-persoanelor-impotriva-caror> (retrieved 2nd of November 2019).

¹⁶ <https://lege5.ro/Gratuit/gezdkobwge/legea-nr-221-2009-privind-condamnarile-cu-caracter-politic-si-masurile-administrative-asimilate-acestora-pronuntate-in-perioada-6-martie-1945-22-decembrie-1989>(retrieved 2nd of November 2019).

¹⁷ http://www.cameradeputatilor.ro/pls/proiecte/upl_pck2015.proiect?idp=12097

their offspring of extreme-right vocation, in 2017, the Parliament passed the Law 127, which declared 14th of May “the national day of commemoration of the martyrs of the political prisons in Romania”¹⁸.

The memorial and compensatory laws were meant to offer some satisfaction to former repressed people and eventually to hinder any public debate about culpability, perpetrators and responsibility. Furthermore, memorial policies promoted by neo-communists transformed the events of December 1989 into the foundation myth of a new political order. The opposite opinion, which considered “the Revolution” of December 1989 as the final stage of communist aggression in Romania, is still marginal. Although, in February 2019, the General Prosecutor of Romania presented the results of an investigation, which defined the execution of Ceausescu and his wife and the bloody events which followed as a Coup d’État joined by a popular uprising, the myth of Revolution is enduring.

The Memorial to the Victims of Communism and to the Anticommunist Resistance known as the Sighet Memorial¹⁹

The changes which occurred in the last 30 years in approaching the communist past can be better acknowledged as we analyse the Memorial of Sighet destiny and visibility in the public space. When, in 1993, Ana Blandiana asked publicly that ‘the Memorial to the Victims of Communism and to the Anticommunist Resistance’ to be recognized as an important institution of the Romanian cultural and public life, the neo-communist authorities rejected such a project. In 1997, the Memorial` destiny changed mirroring the changes in the political life. After winning the elections of 1996, the Democratic Convention recognized the Memorial as an ”enterprise of national interest” (ansamblu de interes național) through the law 95. The Memorial and its museum enjoyed the highly esteemed recognition for a short period of time. When the neo-communists returned to power, they passed, in 2003, a new law of museums, which hindered the ‘the Sighet Memorial’ to be recognized as such.

retrieved 2nd of November 2019).

¹⁸ This law is rather controversial as it was promoted by the Romanian fascists. Their inheritors are the only ones to celebrate it each year in the Revolution square of Bucharest. <https://www.juridice.ro/580565/ziua-nationala-de-cinstire-a-martirilor-din-temnitele-comuniste.html> retrieved 2nd of November 2019).

¹⁹ This part is drawn on the findings published in my article, “Communism at the Museum: Staging Memory at the Sighet Memorial”, in Izabela Skorzynska, Christine Lavrence (ed.), *Performing the Past: Post-Communist Poland and Romania*, Instytut Historii UAM, Poznan, p. 27-53.

The Memorial approach to the past gained momentum on 18th of December 2006 when the Romanian President's proclaimed communism as "criminal and illegitimate", in a discourse in the Romanian Parliament. The statement was based on the *Final Report* (Raportul final) of a Commission to Study the Communist Dictatorship in Romania, formed by intellectuals, former political detainees, and dissidents. The commission lead by Vladimir Tismăneanu made an extensive use of the archives of the 'The Memorial to the Victims of Communism and to the Anticomunist Resistance' in drafting the report.

The 'The Memorial to the Victims of Communism and to the Anti-communist Resistance' or as it is better known, 'the Sighet Memorial', is a complex institution founded by Ana Blandiana, a well-known poet, and an important civic figure in post-communist Romania. The Memorial was created in 1992, and includes an International Center for the Study of Communism, situated in Bucharest, which collects written, oral and visual items pertaining to communist repression and anticommunist resistance, and a museum located in the town of Sighetul Marmăției, in the northern part of Romania, near the border with Ukraine. Patronized by the Council of Europe, 'The Sighet Memorial' organizes conferences and exhibitions, publishes books, collects testimonies, etc.

In 1995, the Memorial received the Sighetul Marmăției prison, a prison for political detainees until 1977, when it was abandoned. The museum, opened to the public in 1997, displays items donated by former political detainees and deportees, and their offspring, documents and maps, audio and video recordings.



Fig. 1. Clothes of an anti-communist fighter in the museum of Sighet. Photo: CFDobre, 2005.

The museum tells the story of an incarcerated Romania, overwhelmed by communist repression, and animated by a genuine anti-communist resistance hidden in the mountains, hills, and forests. By promoting an one side narrative, the museum overpasses its traditional roles of collecting and educating people playing the role of a memorial whose mandate is to articulate a repressed memory, to promote it, as well as to make justice for the victims it represents. Through its permanent or temporary exhibitions, and conferences and public lec-

tures organized there, through its publications, the Memorial addresses national identity (something out of ordinary for the Romanian history happened at this very spot), provides service to humankind and to the Romanian nation (expressed through education about communism), bring honor to the country (bestowed on the persons who suffered there), and promote humanitarianism (the plea that the society should neither forget such inhumanity nor allow it to be repeated).

Monuments as Vehicles of Memory²⁰

The Memorial of Sighet “bends and reshapes the past to a present purpose.”²¹ It reflects the preoccupations of its creators, and to some extent of the society in which it appeared. This is also true about the monuments pertaining to communism. They are concrete images of the relation to this past of the Romanian society. When changes occurred, like after the Second World War or in December 1989, the monuments were under attack, being demolished, destroyed, and only sometimes stored away.

Destroying statues and other ideologically-charged monuments, renaming streets, towns, and squares, operating spatial reconfiguration and historical reinterpretations – all these speak about the interest of political order in manipulating history and controlling territory²². Often, the replacement of a regime with another entails the re-arrangement of space and the re-writing of the past in order to suit the new ideological paradigm. However, as recent developments showed, social revolutions and political driven forces can also play part in re-defining the monumental landscape.

When communism fell in Romania, in December 1989, the public space was filled with monuments dedicated to national heroes, historical and cultural figures. Only few statues represented communist leaders, such as Lenin or Petru Groza, were still standing. Stalin statue had been already quietly removed in 1960. To these two statues can be added a few busts dedicated to Marx and other socialist Romanian figures.

²⁰ This part is retrieved from my article, “Pasts Into Present: Ideology, Memory, and Monuments in Communist and Post-communist Romania”, published in *Sensus Historiae*, 3 (24), p. 175-194.

²¹ Graeme Davison, “Heritage. From Patrimony to Pastiche”, in Graham Fairclough, Rodney Harrison, John H. Jameson, John Schofield, eds., *The Heritage Reader*, London-New York, Routledge, 2008, p. 35.

²² Katherine Verdery, *The political lives of dead bodies: Reburial and postsocialist change*, New York, Columbia University Press, 1999, p. 6.

All these statues and busts were demolished and stored away or destroyed. The monuments dedicated to national figures became objects of active politics of remembering and / or re-appropriation. New monuments honoring the victims of communism were built all over the country.

After Ceaușescu's fall, a liberating feast took place in the capital and in the countryside. The exorcism started as early as January 1990, culminating on 3-5 March 1990 with the dismantling of the statues of Lenin and Petru Groza in Bucharest.

Lenin statue was unveiled on 21 April 1960 and represented a standing Lenin who delivered a speech. Built in bronze, six-meters high, the statue was placed on a red marble pedestal, in front of the House of the Party Newspaper, *The Spark* (Scanteia). As Lenin enjoyed a good reputation during the whole communist period, the statue featured prominently in parades and during state visits.



Fig. 2. Petru Groza in Mogoșoaia. Photo: CFDobre, 2010

After the statue was torn down in 1990, it was abandoned in Mogoșoaia, near-by Bucharest, while the pedestal stood empty for years. From time to time, discussions about a

proper replacement of Lenin's statue were opened by intellectuals and artists without much success until January 2010.

On 26th of January 2010, at 11 a.m., Ioana Ciocan, a lecturer at the University of Bucharest, Faculty of History, started to "run an art program for temporary public art."²³ After struggling for months to obtain authorizations, the artist eventually could place a Lenin made of boiled wheat and fruity drops on the pedestal. Entitled, "Ciocan vs. Ulyanov",

²³ Proiect 1990, *Program de artă în spațiul public 2010-2014/Art in Public Spaces Program 2010-2014*, project by Ioana Ciocan, Bucharest, Vellant, 2014 (hereafter Proiect 1990), p. 11.

the “coliva”²⁴ Lenin resisted only 24 hours. It was followed during the next four years by other 19 artistic installations. In May 2010, “Replacing Lenin”, the second installation, was a moving one. Three musicians stand on the pedestal while interpreting a tango for 5 minutes. It was “a musical voodoo against Lenin,” as Ioana Ciocan stated in the catalogue dedicated to the project²⁵. The artistic installations dealt not only with memory of communism, but also to other issues such as the desire of power as it was illustrated by the sculpture “Hydra”.



Fig. 3. Hydra.Project1990. Photo: CFDobre, 2010

The project ended on 14th of April 2014 as a new sculpture, which was meant to take the place of Lenin, was ready to be installed. Project 1990 was the first project of public art to be displayed in Bucharest after the fall of communism. Through its artistic installations, it stands for an unaccomplished cathartic process of the communist and transition periods.

The Lenin’ pedestal was meant to be destroyed in order to erase the traces of communism. It is part of the amnesia program promoted by neo-communists. Actually, one of the prominent neo-comunist leaders, Adrian Năstase, Prime Minister of Romania between 2000 and 2004, signed in 2003 the decree which enshrined the destruction of the pedestal and the construction of a new monument dedicated to the anticommunist fighters and to the victims of communism. As an irony, or maybe not, the sculptor who designed the new statue was a pupil of the creator of the marbleized Lenin. The sculpture, called “Wings”, was installed in the spring of 2016. 27 meters high, 40 tones each wing, the monument stirred controversy when it was unveiled. Erwin Kessler, a journalist, editor, curator and an art influencer, stated that he would have preferred the empty pedestal and its temporary monuments instead of a permanent artistically ‘insignificant’ statue. “The empty pedestal was a symbol of

²⁴ Boiled wheat, traditionally seen as ritual food for funerals.

²⁵ Proiect 1990, p. 13.

liberty and a possible reference point of a sharp public morality. Its destruction and replacement by a monument of Guinness book type represent another moment of weakening the national ethic.”²⁶



Fig. 4. The Monument Wings. Photo: CFDobre, 2020.

The statue of the first pro-communist Prime Minister, Petru Groza (1884-1958), was built in bronze, on a granite and marble pedestal. Placed at a square near the Medical University in Bucharest, it was inaugurated on 6 March 1971²⁷ and dismantled on 5 March 1990. From 1993, on its pedestal was placed a statue dedicated to the Romanian artillery.

The destiny of the communist built monuments failed to generate a public debate on the status and function of monuments in Romania. As an intellectual pointed out, ‘in Romania the monuments never stirred any debates, [instead] they were objects of bitter jokes’²⁸.

At the time of the Lenin and Petru Groza statues’ dismantling, the historian Andrei Pippidi was among the very few intellectuals who took a stand against such practices. In an article published on 8/9 March 1990 he argued that: ‘It would have been preferable that our statues stood

²⁶ Erwin Kessler, “După soclu” (After the pedestal), in the magazine 22, May 2014. Online at: <http://www.revista22.ro/dupa-soclu-41895.html>, last accessed 27 May 2014.

²⁷ Another statue of Petru Groza was inaugurated in 1962 in Deva. Created by Constantin Baraschi, it was dismantled after the fall of communism. In 2007, the statue was replaced in the birthplace of Petru Groza, in Bacia.

²⁸ Augustin Ioan, ‘Arhitectura cărei memorii?’ (The architecture of which memory?), *Dilema Veche*, 307/2010, <http://arhiva.dilemaveche.ro/index.php?nr=307&cmd=articol&id=12189>

for ever... instead of mirroring the changes that took place in our country during the last century',²⁹.

If the statues of the communist leading figures were torn down, the 'Pantheon of the socialist heroes and of the socialist revolution', as it was named by the former regime, better known as the Mausoleum, was re-used by the new political order. Built in the centre of the interwar Carol I Park, the monument was meant to serve as a burial place for the Romanian communist leaders. Inaugurated on 30 December 1963, the 48-metre high mausoleum hosted in its circular hall the tombs of Petru Groza (the first pro-communist Prime Minister) and C. I. Parhon (the first president of the communist National Assembly), and the embalmed corpse of the General Secretary of the Romanian Communist Party, Gheorghe Gheorghiu-Dej. On the sides, the corpse of other socialist³⁰ and communist leaders were buried.



Fig. 5. The Mausoleum. Photo: CFDobre, 2010

After the fall of communism, the corpse of Gheorghe Gheorghiu Dej was given to his family and buried at Bellu cemetery in Bucharest. In 1991, the remnants of the other socialist and communist figures

²⁹ Andrei Pippidi, (2000), *Despre statui si morminte. Pentru o teorie a istoriei simbolice* (On statues and tombstones: For a theory of symbolic history), Iași, Polirom, 2000, p. 225-226.

³⁰ When the Communist Party of Romania united with the Romanian Socialist Party, the communists claimed the socialist heritage.

were given to their families as well.

In 1993, the neo-communist authorities decided to bring into the mausoleum the remnants of the soldiers from the First World War. In 2002-2003, the neo-communist Prime Minister mentioned above wanted to demolish the Mausoleum and to give the place to the Orthodox Church, which wanted to build a new cathedral on the spot. The opposition of the mayor of Bucharest, the future president of Romania who condemned communism in 2006, and of some NGOs forced the Prime-Minister to give up to his idea. The Mausoleum is still standing on a hill in Bucharest, in the Carol Park, being a focal point for skateboarding activities.

As the communist monuments were demolished, destroyed or re-used, new statues and busts dedicated to historical figures were built largely as a result of private and local initiatives. During the first post-communist decade, the communist laws concerning patrimony were not replaced by new ones thus creating a legislative vacuum. Only in 2001, a new law of national patrimony, inspired by the communist practices, which centralized the decision of building, restoring, moving the monuments, was adopted.³¹

In the first post-communist decade, the controversial figure of the commander-in-chief and authoritarian leader during the Second World War, Ion Antonescu,³² enjoyed public recognition. He was depicted in the public space as a great patriot and a victim of communism. Several busts representing the Marshal were built in various parts of the country, and in the capital, but, after his condemnation for the genocide of Jews in Transnistria, and Odessa, Antonescu's busts were relegated from the public space to museums³³.

The Holocaust started to be commemorated in post-communist Romania only under the pressure of international institutions and public

³¹ Kovacs, *Timpul*, p. 32-34.

³² Ion Antonescu, a general of the Romanian army, became the chief of the state during the Second World War. Arrested on 23 August 1944 by King Michael with the support of all political parties, he was deported to Russia with the help of Romanian communists. He was brought back to Romania where he was judged, condemned to death, and executed in 1946 by the communists. After the fall of communism, in 1991, the Romanian Parliament dominated by neo-communists celebrated Antonescu as a hero and a victim of communism. In 2000, he was condemned for the genocide of the Jews in Transnistria.

³³ According to the decree no. 31 from 2002, article 12, it is forbidden to build statues of persons condemned for crimes against humanity and to display them in public space, except for museums.

figures such as the Nobel prize winner, Elie Wiesel³⁴. After 2002, the urban landscape welcomed a few monuments dedicated to the Holocaust victims in Bucharest, Oradea, Cluj, Satu Mare. They commemorated the Jews deported from Romanian territories during the Second World War by the Hungarian and Romanian authorities. In 2009, a Holocaust Memorial was unveiled in Bucharest generating intense debates on the non-existing memorial of communism's victims.

Shortly after the fall of Ceausescu, the victims of the communist persecutions were remembered and honored all over Romania according to a local tradition, namely of building crosses. The Association of the Former Political Detainees also built several monuments in some of the hot spots of the communist repression: Poarta Albă, Aiud, Mediaș, Cluj, etc³⁵. A monument dedicated to the much celebrated anticommunist fighters of Nucșoara was built in the said village³⁶.



Fig. 6. The monument of the Nucșoara anticommunist fighters in the village of Nucșoara. Photo: CFDobre, 2012.

When the Democratic Convention won the election in 1996, they decided to appropriate the Revolution Square of Bucharest, a symbol of the fall of communism, by

building a statue to the memory of Iuliu Maniu, the former president of the National Peasant Party who died in the communist prison of Sighet in 1953, a beacon of democracy in interwar Romania and a founding father of Greater Romania. The statue was inaugurated on 1st of December 1998 by the president of Romania, the Prime-Minister of the time and other leaders of the National Peasant Party.

³⁴ Elie Wiesel was born in interwar Romania, in Sighetul Marmatiei, the town of the Memorial.

³⁵ In the localities mentioned in the text there were prisons for political detainees.

³⁶ In the Nucșoara region, in the late 40s and early 50s, there were several groups of anticommunist fighters hiding in the mountains. They resisted the attempts made by the authorities to capture them for several years. After the fall of communism, the Nucșoara anticommunist fighters becoming a sort of heroes and martyrs of the nation.



Fig. 7. Iuliu Maniu's statue in Bucharest. Photo: CFDobre, 2010

The National Peasant Party was the leading party of the coalition in power (1996 to 2000), therefore, its first post-communist leader, Corneliu Coposu (1914-1995)³⁷, imprisoned by the communist regime for eighteen years, was honored with the creation of a bust as soon as 1996. Corneliu Coposu bust is placed in front of Iuliu Maniu statue, on the other side of the road, leaving the impression that the two leaders were engaged in a dialogue.



Fig. 8. The Bust of Corneliu Coposu. Photo: CFDobre, 2010.

Iuliu Maniu was celebrated also in other parts of the country, monuments dedicated to his memory were built in Cluj, Oradea, and Alba Iulia. On 8th of January 2019, a statue of Iuliu Maniu was

inaugurated in Cluj by members of the Romanian Academy, which paid for the statue³⁸. A few months later, in April 2019, another statue was

³⁷ Corneliu Coposu statues are to be found also in Iași, Râmnicu Vâlcea, Timișoara, and Drobeta Turnu-Severin.

³⁸ <https://cluj.com/articole/statuia-lui-iuliu-maniu-la-cluj/>, retrieved on 10 of June, 2020.

unveiled in Oradea to celebrate 100 years from the installation of the Romanian administration in the city. If the statue built in Alba Iulia in 1995 was meant to commemorate Iuliu Maniu as a founding father of Greater Romania but also as a martyr of communism, in Cluj and Oradea, Iuliu Maniu was celebrated as an important historical figure, a fighter for the unity of all Romanians.

The Revolution Square is a highly symbolic place of Bucharest. Hundreds of people died on the spot in December 1989 in their attempts to get rid of communism and to obtain freedom. Therefore, all political groups were longing to display their own symbols in that particular corner of the capital.



Fig. 9. The Revolution Square.
Photo: CFDobrea, 2010.

When the neo-communists were in power (2000-2004), they also decided to use the space in order to commemorate the Revolution. Entitled the ‘Memorial of Rebirth’, the project was chosen by President Ion Iliescu himself despite the advise of the established jury. Unveiled in 2005, the monument stirred controversy as regards both its underlying message and its artistic form. Shaped like a spike or pale, the monument prompted associations with impalement, the execution method of the medieval Romanian prince Vlad the Impaler / the notorious Dracula, and it has been the subject of mockery ever since its inauguration³⁹.

Conclusions

The patrimonialization of the communist past in post-communist Romania is a twofold phenomenon: one the one hand, communism was demonized while its victims celebrated as martyrs, and, on the other, it

³⁹ The monument was called „Teapa” (The spike), „vector cu coronita” (Vector with a tiara), „cartof tras in teapa” (the spike potato), „circumcizia ratata” (the failed circumcision), „monumentul cu penetrare” (the monument of the penetration), „un creier pe bat” (the spike brain), „cartoful revolutiei” (the potato of the revolution), „teapa revolutiei” (the spike of the revolution), „ou pe bat” (egg on spike), „kitsch cu patalama” (the honored kitsch). *Hotnews.ro*, retrieved on 30 April 2008.

was thrown away to the dustbin of history without comments. The last approach, promoted by neo-communists, was meant to hide the responsibility of their precursors in perpetrating victimhood upon the Romanian nation.



Fig. 10. The Renaissance Memorial in the Revolution Square in Bucharest. Photos: CFDobre, 2010.

In 2006, the communist regime was condemned as “illegitimate and illegal”, but the statement had no legal effects. The perpetrators of the sufferings kept on controlling the society, the economy, the political and cultural life of Romania in the following (as in the previous) decades as well. Their offspring enjoyed privileges such as highly paid public functions, influence in the political life, mass-media and administration while making a lot of money through contracts given by the state. Meanwhile, the inheritors of the repressed people are struggling to keep their ancestors memory alive. Relegating this memory to monuments, memorials and museums do not hinder oblivion, but rather encourages it.

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Ideological Impact on Social-Economic Development of the Region of Tusheti (Georgia) after WWII

Abstract: *The paper deals with one of the highland regions of Eastern Georgia - Tusheti, which represents a geoeconomic and ethnocultural phenomenon from a scientific and worldview perspectives. The research sheds light on ideological influences on the socio-economic and the cultural situation of Tusheti from the 1930s to the present day, a number of shortcomings and consequences of Soviet economic reforms, and on its backdrop. The Tush people, uncontented with the system joined an anti-Soviet organization linking the idea of Georgia's independence to the European countries. The centuries-old model of life based on communal relations, setting up on the democratic principles (the right to private property, equality, freedom of speech) was destroyed by Soviet ideological pressure. These principles naturally merged with European values.*

For centuries, Tusheti, placed in the geostrategic area was of great importance not only for the security of the region, but it also was a natural bridge in connecting the Eurasian cultures. Its strategic importance was particularly increased in the post-Soviet period. The contours of the geostrategic location of this region was revealed exactly in this period. The importance of the sustainable development of Tusheti has transcended national and state boundaries and has come under international environmental frameworks, which have laid the foundation for adapting traditional knowledge and experience with modern international standards and irreversible processes of cooperation.

Based on the analysis of scientific literature, historical sources, and field materials, I conclude that the elements of the pro-Western orientation that affects Georgia have been felt in Tusheti from social and cultural viewpoints. Integration into European culture is of great importance for the preservation and further development of Tusheti cultural heritage.

Key words: *ideological impacts; Tusheti; Eurasian culture; totalitarian ideology, "communist experiment".*

Introduction

A stunningly beautiful corner of Georgia – Tusheti is located in the northeast part of Georgia. This area of the geostrategic space has always served not only as a natural bridge in linking Eurasian cultures but also as a guarantor of state security. Due to its distance from the center of the country and its proximity to Dagestan and Chechnya (the territories of Tusheti border Dagestan and Chechnya within the Russian Federation), Tusheti had to protect itself and the borders of the state by means of its own forces. Under the hostility of neighbouring states and the pressure of totalitarian ideology, it endured numerous political strains and preserved its original natural complexes, own breeds of sheep and horses, as well as indigenous material and spiritual cultures.

After the violent sovietisation of Georgia, the ideological policy of creating a “new man” by the Soviet authorities was particularly severe in Tusheti, which has its explanation. The peculiarities of the economic activity of the local population, which, in turn, was caused by the physical and geographical location of Tusheti, has enriched and strengthened the society of Tusheti for centuries. The Soviet authorities hit the very foundation of Tusheti’s economic power - its activities. This process, which began in the 1930s, particularly intensified after World War II, when science was involved into the battlefield. The anti-science, “the communist experiment” has demonstrated the harm of ideological influence in all socio-economic activities of the society in the country, in general, and in Tusheti, in particular.

Result of the organization of collective farms

Historically, the physical and geographical mountainous location of Georgia determined the characteristics of the population’s settlement and farming activities. For centuries, remnants of Tusheti patrimonial system has been associated with signs of private farming, which upheld the principles of equality, personal freedom, as well as freedom of speech. All of this determined the peculiarities of the socio-economic system of Tusheti society in the twentieth century. Within the Tusheti agricultural community, unlike the system of the land use, the development of cattle-breeding was mainly based on private ownership.

After violent sovietisation of Georgia by Soviet Russia, the totalitarian system and Communist ideology stroke a blow against these institutions. However, after the collapse of the Soviet economic system, it was soon forced to liberalize socio-economic life, taking the course of pursuing a new economic policy (“NEP”), based on the development of

individual peasant farming. This improved the socio-economic conditions of Tusheti at the expense of improving the situation of stock-breeding peasants, which was unbearable in the early years of Soviet occupation. According to archival documents, the Tush peasants were actively joining the agricultural cooperatives and partnerships established in Georgia at the time. They individually joined the sheep-breeding unions, such as “Shepherd” and “Birliki”, and developed their farming. In addition, they cooperated with the Transcaucasian Union of Cooperative Societies (Zaksoyuz), which promoted the development of agricultural production (Kakheti regional... 6, 11). The partnership “Shepherd” assisted shepherds in selling wool, cheese and other items, as well as tackling issues such as setting fair prices on the Tush wool and resolving pasture issues (Georgian central... 392, 22).

Under conditions of maintaining traditional peasant farming, the profits from the sale of production increased year by year, ensuring further development of the sector. The number of peasants joining cooperatives is also indicative of the scale of their activities. According to archival documents, in 1928, the number of members of the cooperative “Shepherd” constituted 616 peasants, and net profit on the peasant farm accounted for 2147.24 roubles. The cooperative satisfied 65% of the population’s needs (Kakheti regional... 6, 28). Thus, the economic policies enforced by the Soviet authorities prior to World War II, which focused on livelihoods and physical survival, contributed to the development of individual peasant farms. All this strengthened the social and material situation of the peasants in the village.

Under the conditions of the economy liberated from ideological influences, the socio-economic situation improved soon, enriching the part of the community of Tusheti that was weakened during the first years of the Soviet rule, which was then declared a “class enemy” in the process of the ideological Soviet agricultural construction. As a result of the construction of agricultural collectivization, the activities of the cooperatives-partnerships ceased.

The people of Tusheti have paved the way during the struggle for the collectivization as the entire Georgia. In order to eliminate class differences, the Soviet authorities expropriated the property of “Kulaks”. They were denied access to the collective farming and were deprived of their suffrage. The “upper layer” of the Tush society was divided into two categories. Some of the peasants of the first category were exiled to the northern regions of the empire – Siberia, Urals, Kazakhstan, while other peasants with their families were exiled outside the village and their

entire property was confiscated. Civil rights were restored for some peasants of the second category after expropriation of property. 131 peasants of the Tush society were declared “Kulaks” by the resolutions adopted during the meetings of the Agricultural Union and our calculated statistics (Kakheti regional... 6, 31). The documents read: “uses hired labour”, “lives on income, such as capital gains”, “is engaged in religious and cult servings”, etc. As a result of collectivization, the wealthy and hard-working peasants were completely destroyed in Tusheti.

In Tusheti, “dispossession of the Kulaks” became mass and organized, followed by peasant discontent, protest riots (deliberate hiding of goods, slaughter), and sometimes even armed resistance. In 1929-1935, the number of sheep in Tusheti decreased by 60% (Kakheti regional... 7, 38). In the process of forming farms, agriculture became a disaster.

The further economic measures of the Soviet authorities were aimed at further weakening the material condition of the wealthy peasants of Tusheti: taxation of the peasant declared “Kulak” was carried out not on the basis of the established norm (3%) but on individual basis depending on peasant’s income (Kakheti regional... 6, 28). In addition, they were forced to enter collective farms and consolidate immovable property. In 1930-1937, 224 Kulaks’ farms were taxed on an individual basis in Tusheti society (Kakheti regional... 6, 29). The research shows that the tax was increasing every year at the expense of the private sector. For example, the property taxation averaged 505 and 1040 roubles per hectare in 1932 and 1933 respectively (Kakheti regional... 6, 31). They were charged with trade, tax evasion, and the use of hired labour. Some of the blacklisted peasants were exiled to the eastern districts of the Soviet Union, some were killed in the “Bloody Terror of 1937”, and others, after being expropriated, had their votes restored and were released from the category of Kulaks after what remained: “a one-room house, 0.15 hectare of arable land, goat and sheep – 0, horse, cow – 0, work-stock, buffalo – 0, vineyard – 0, with 30.50 roubles to be paid for economy” (Kakheti regional... 7, 11).

Although the Agricultural Council repeatedly discussed the Kakheti Regional Executive Committee’s decision to set up economies in the villages, the establishment of economies failed in Tusheti Mountain despite the efforts.

The so-called economies established in the valley were too weak. The materials studied in the archive confirm that a collective farm was established in Zemo Alvani (Upper Alvani) in 1928, uniting 25 peasants (Kakheti regional... 6, 16). However, the economy was soon disbanded

as there were no farming mechanisms in the community. In 1929, the Shepherd Cooperative was established with only one peasant (Kakheti regional... 7, 13). In 1931, a collective of “Tsisteli Mtskemi” (The Red Shepherd) and “Shinsakhkom” (The People’s Commissariat for Internal Affairs) were established in the village (Kakheti regional... 6, 27), but these economies were soon disbanded as well. The aforementioned facts demonstrate that the economies, which were created forcibly, were so weak that they soon ceased to exist. The main reason for this over the centuries was the traditional private-owned economies and related institutions in Tusheti, which defined the system of socio-economic relations of Tusheti society and for which ideological, alien for human nature institutions were unacceptable.

Anti-Soviet sentiments during World War II

Violent attempts of the formation of the collectivization of agricultural economies, liquidation of “Kulaks” as a class, bloody reforms, which killed thousands of hardworking and high-minded patriots, brought in certain tension before World War II in various regions of Georgia. However, anti-Soviet appearance was manifested only in Tusheti during World War II.

The reason for the hostile attitude of the Tusheti society towards the Soviet authorities, apart from the sadness caused by the occupation of the country in general, was the construction of economies carried out by them. Anti-Soviet mind set was especially evident during World War II. The Tush people turned the military service down, created the anti-Soviet organization “Samani” (Young Nationalists for the Advancement of Georgia) and stood alongside the patriotic people who dreamed of the revival of Georgia’s independence. The young Tush people deeply believed that if the European country - Germany won, Georgia would gain independence, disintegrate economies and restore the natural way of life development. During the agitation, Adam Bobghiashvili, the head of the organization emphasized namely this factor. According to him: “Now you see that the Soviet Union is hopeless, the Germans have come in the Caucasus, they will come here next summer and destroy the collectives, private property will be returned to people and injustice will find its end” (Georgian central... 6, 21725). The economies were abolished in Tusheti, a “micro-national” government was established and Soviet laws were no longer in force for six months (‘Simartle, 67’).

The National Movement that was initiated in Tusheti was named “Banditism” by the Soviet authorities, calling them enemies of their

homeland and launching mass repression. All people or family members who had links to the illegal organization operating in Tusheti were shot or exiled together with Samani's leadership. More than 52 people were arrested in Tusheti (Tsotsanidze, 33).

Socio-economic situation of Tusheti in the 50-80s of the 20th Century

World War II was a watershed for the Tusheti community. New "scientific", communist experiments, aimed at eradication of their roots of agricultural economies in Tusheti, and thus, the impoverishment of the population and promotion of their migration processes from the country, which were carried out successfully, were added to the following list: pre-war activities of the Soviet authorities, violent collectivization efforts, the process of dispossession of the Kulaks, mass repressions and suppression of anti-Soviet campaigns in the blood.

It is well known that the Tush people have adapted to natural climatic conditions for centuries and have breed sheep by means of folk selection that are well adapted to alpine and subalpine pastures and have unique biological properties as well. Soviet science threatened the very existence of such a sheep, which was traditionally the basis of the powerful Tush economy.

In the matter of breeding a new breed of highly productive sheep, Soviet science paid attention to the Tush sheep, as compared to other coarse-woolled sheep breeds, the Tush sheep were distinguished by their good taste of meat and cheese, as well as their wool of good quality and characteristics. In 1932, the Union of People's Commissariat of the Georgian SSR adopted a decree on improving the pedigree composition in stockbreeding in Georgia: "appropriate measures to be taken to improve Tush sheep and massive trials for long-term cross-breeding with English long-woolled breeds (Lincoln, Cheviot, etc.) to be conducted" (Komunisti 1932, 135). In 1932-1935, the Soviet authorities imported 147.7 thousand of the best soft-wool Lincoln sheep (Transactions 1941). However, the livestock could not withstand harsh climatic conditions and died.

In 1947-1958, the Soviet authorities introduced German Wurttemberg and Swiss 'Precops' sheep for further refinement of the Tush sheep (Mosashvili, 1940). Although both breeds adapted to the alpine and subalpine pastures of the mountain and driving over long distances, the cross-breeding under the large farmland conditions appeared to be fruitless and sheep production became less productive.

The 30-year-old process of cross-breeding of the Tush sheep – breeding of soft-woolled, fat-tailed Georgian sheep was halted in 1961 due to the failure of Soviet scientific experiments. The unsystematic breeding of sheep created various hybrid sheep and deteriorated the qualities of the Tush sheep, while a scientist or a local resident who opposed the process was declared an “enemy of the people” and was sentenced to be shot (MIA, 6, 76).

The communist experiments led to the migration of the population from the mountain to the valley. The Soviet government, focused on increasing sheep population, violated the traditional mountain lifestyle to reinforce its rule and in the 1950s began forcibly resettling the population to the valley (“Sophlis Tskhovreba”, 1989, #57). The Soviet authorities ignored the Tush people’s request and, in 1952-1957, abolished first the Tush economies and gradually joined them to the economies in the valley, and then forced the population to displace. Tusheti became a temporary place for livestock grazing, while villages became deserted.

All of the abovementioned processes fundamentally changed the geosocial picture of Tusheti life and rehousing. The main housing of the Tush people was moved to the villages in the valley – Zemo Alvani (Upper Alvani), Kvemo Alvani (Lower Alvani) and Laliskuri, while Tusheti acquired the function of summer pastures and seasonal housing. According to the census conducted in 1931, 379, 110 and 70 households were registered in Tusheti in 1931, 1963 and 1975 respectively (Kurdghelaidze, 1983, p. 24). The statistics clearly illustrate the dynamics of migration processes from Tusheti to the valley.

The Dagestanis began to settle in the border villages of deserted Tusheti. They transported cattle, occupied pastures and settled there. According to archival documents, there was an attempt to bring about changes on the borders of Georgia and Dagestan in 1958-1961. “Georgia had to cede 40 km of the territory for Dagestan in Tusheti” (Archives of Contemporary... 2119, 58).

The Tush people still remember the decision of the first person of the Soviet Union, Nikita Khrushchev to alienate the lands of Tusheti, which created the danger of losing Tusheti’s historically-owned land and border pastures. It is true that the government of Georgia at the time saved Tusheti and gave it the importance of a resort, but there was always the danger of losing those territories.

The mass resettlement of the Tush people and the reforms carried out by the Soviet authorities made the population hostile towards Soviet Union. The anti-Soviet developments in Tusheti during World War II

convinced the government that the unregulated settling of freedom-loving people and compacting them into one place could transfer the Tusheti population into a disobedient society. Therefore, in order to avoid resistance, the Soviet authorities arose labour interest of the Tush people in the agricultural sectors of Russia, in particular sheep breeding, and promoted their resettlement and integration into Russian society.

The migration of the Tush people in the district of Astrakhan began in 1954-1955. Their number was gradually increasing. Unofficial reports stated that more than 300 families moved to Russia temporarily in 1954-1970 ('Sakartvelos Respublica' 1976, 76). They lived in the districts of Astrakhan and Volgograd, in the region of Stavropol, in Rostov Oblast, in Kalmykia, in Voronezh Oblast, and Kazakhstan.

In the 1980s, the Georgian authorities took separate measures aimed at correcting mistakes and criminal activities, restoring farms, affected and weakened agricultural sectors, and rebuilding villages, with virtually no results (Gegechkori 1983). The revival of the shattered traditional socio-economic system became impossible.

The dismantling of the totalitarian system and the breaking down of ideological boundaries, which took place in the 1990s as a result of the collapse of the Soviet Union and the Socialist camp, had a beneficial effect on the socio-economic development of Tusheti, but this also posed new challenges. The country's socio-economic crisis, which began in the late 1990s, accelerated the labour migration of the Tush people to major European states, the United States and the United Kingdom. Our surveys showed that 18.8% of the population left Zemo and Kvemo Alvani in 2006, 20.1% in 2010 and 23.4% in 2017. Statistics show that emigration acquired a large scale in Tusheti.

The Tush people residing outside of Georgia, who shared Western lifestyle, culture and experience and who did not cut ties with Georgia, were actively involved in supporting the activities oriented towards the development of Tusheti both personally and financially. According to the data for 2016-2019, the Tush living in the US donated 27030 USD to "Tusheti Development Fund", while the Tush living in London – 6780 EUR.

In the post-Soviet space, when the existing economic sectors of the Soviet Union collapsed and Europe was a major guarantor of the overall development for Georgia, facing a new challenge, Tusheti actively involved in EU economic programs and projects. The non-governmental organization "Tusheti" put forward an initiative to create Tusheti protected territories during the meeting of All-Tusheti in 1990. This was the first

time in the world's environmental protection practice that the local community initiated and publicly legitimized the idea of creating protected areas. Approximately 30 experts from the World Wild Fund for Nature, the Global Environment Fund, the World Bank and other entities acknowledged the uniqueness of Tusheti's biosocial historical-cultural heritage, and noted that the initiative of local people was the most important factor in granting Georgia a grant in the amount of 9 million USD.

Tourism development in Tusheti

Tusheti has always attracted the attention of scholars. With its natural conditions and rich historical past, its unique exotic colouring has always been a subject of keen interest for scientist, writers and travellers. Linguists from all over the world interested in the study of the Chaghmatush dialects of the Georgian language and as well as Tsovatush language visited Tusheti. The American architect D. Vance, who travelled to Tusheti in 1981 and was fascinated by its beauty, said: "All this is a great business" (Gegechkori 1983, 97). His words clearly demonstrate the importance of the Tusheti region in the development of Georgia's economy in the context of free economic development today.

Taking into account environmental and cultural heritage protection and under the conditions of infrastructural support by the state, tourism and agriculture are able to transform Tusheti from an endowment region into an economically self-sufficient and cultural and natural region, attraction of which is at the same time a prerequisite for the development of tourism potential in Kakheti as a part and Georgia as a whole.

Tusheti has good prospects for tourism development. This is primarily due to material landmarks. Tusheti has some old and deserted villages, many of which have preserved the late way of life and summer holidays and festive occasions. The Tush hospitality has always been a guarantee of visitor's safety.

Today, tourism plays a significant role in the development of Kakheti, in particular Tusheti. The annual number of visitors is increasing rapidly, which according to the data of past ten years implies an average annual increase of 10%. Consequently, the number of family hotels is also increasing. A survey covering all villages in Tusheti has showed that almost half (47%) of families are engaged in various types of economic activity in Tusheti. Most of these activities (83%) are related to tourism, while cattle breeding constitutes (14%). In total, 43% of local people's income in Tusheti is related to economic activity. Although the tourism

industry in Tusheti is seasonal, the potential income from foreign visitors was estimated at around 1.4 million GEL.

Given the current situation, the tourism industry does not represent the main means of sustaining for the population in the mountains, but today the main income of the population is related to tourism, which significantly contributes to further development of the local economy.

Future perspectives for Tusheti renewal

Given its unique natural and historical-cultural significance, Tusheti has been granted the status of protected areas since 2003, including the State Reserve, National Park and Protected Landscape.

In assessing the importance of breaking ideological boundaries, in the case of Tusheti, its international recognition should be cited. In 2011, Tusheti came in at five in the Top Ten of the World's Best Unknown Places, published by Yahoo Travel and CNN. In 2013, the Road to Tusheti was named one of the most extreme roads in the BBC documentary "The Most Dangerous Roads in the World".

In 2015, with the support of the European Union (EU) and with the assistance of the European Neighbourhood Programme for Agriculture and Rural Development (ENPARD), a forgotten tradition of the production of the Tush cheese "Guda" was revived, which facilitated the Tush cheese production according to traditional methods, as well as domestic and foreign market sales of cheese.

The Tush society has been actively involved in economic relations with European states. At the International Cheese Festival held in Italy, the Tush cheese of the company "Alaznistavi" won the main prize at the competition. The festival was arranged by the organization SLOW FOOD. Its main priority was to preserve the naturalness and taste of traditionally made cheese and other food products.

The Tush Guda cheese made in compliance with modern standards and traditional technologies has been exported to the US and Israel. This circumstance indicates that the Tush sheep products, which are distinguished by richness and ecological purity, may well become one of the competitive products on the world market.

Conclusions

Thus, post-World War II economic reforms in the Soviet Union completely changed the economic structure of Tusheti agriculture. The confluence of private social economies made the traditional sphere of Tusheti unpromising and unprofitable. And in a new geostrategic space,

Tusheti has become the subject of discussion among neighbouring states. The “communist experiments” justified the goals of the Soviet leaders, and the state received cheap agricultural production and only the state had the right of its disposing. However, their measures sharply reduced capacity to work, as well as the quantity and quality of production. The peasants lost interest and therefore the opportunity for independent development. The changes in the 1990s, the breakdown of ideological boundaries, the rapprochement with the Western world have had a beneficial effect on the socio-economic development of Tusheti, but it has also faced new challenges that are now being successfully resolved.

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The Bulgarian International Tourism in Late Socialism – between the Class-party Ideology and the Economic Interest

Abstract: *After the 1960s the international tourism was developed as an important economic branch of Eastern European countries and space where the economic interests, ideology, consumption, and social policies were entangled. In this study, I will undertake a historic-anthropological analysis of international tourism in Bulgaria in the time of late socialism, which is based on a case study of Borovetz, the biggest Bulgarian mountain resort during socialism. The research question addressed are: how the regime was trying to establish legitimacy through tourism – among Bulgarian citizens and internationally, which is the role of the ideological confrontation with the West in the period of the Cold War and which are the leading strategies in the management and the work culture in the branch of international tourism at that time.*

Key words: *international tourism, late Socialism, ideology, state-socialist economy.*

Introduction

If you decide to spend your winter vacation in the Bulgarian ski resort Borovetz, you will encounter a typical landscape of postsocialist Bulgaria: poorly maintained infrastructure, in the historic center of the resort – the ruins of a bus station and ghostly remnants of a state building that housed the headquarters of enterprise “Tourism and recreation” from the socialist period; several old family villas restored after their restitution reminiscent of the pre-war past of Borovetz as a royal resort; hotels built in the 1970s and 1980s and unchanged to this day testifying to the glory of the resort as a “champion” of the socialist winter tourism; many new hotels built haphazardly with indeterminate architectural style - from "Mafia Baroque" to "alpine", along the main street - a number of small

wooden houses with tumble-down look and shabby advertisement billboards. In the winter the snow helpfully covers the badly maintained streets and the spaces between them. In the summer, the view is even more depressing and leaves a feeling of decadence and inhospitable house keepers. Borovetz has produced this impression in me, and probably in many tourists - the resort guests who are fewer in number each year.

Borovetz was the site of my ethnographic fieldwork in 2005-6 and 2011-12. Since tourism is not only a formidable economic force, but it has also been operated by various types of governments as an instrument at the juncture between ideology, consumption, social harmony, and national coherence (Baranowski, Furlough 2001; Koshar 2002; Grandits, Taylor 2010; Gorsuch 2011; Koenker 2013; Ivanova 2018), I chose the case of the largest Bulgarian ski resort in the socialist period to address the question how the regime was trying to establish legitimacy through tourism – among Bulgarian citizens and internationally. I was also interested in the role of the ideological confrontation with the West in the period of the Cold War and the leading strategies in the management and the work culture in the branch of international tourism at that time. The international resort provides a suitable field for studying the relationships of trust/distrust and related informal practices for several reasons. This is a space in which the Bulgarian citizens, working in the resort, communicate with foreign tourists who came from the countries of the Eastern Bloc as much as from Western Europe. It is interesting to take notice how the spy mania and distrust towards “the capitalist world” that existed throughout the Cold War period as a constant in the Bulgarian official propaganda were reconciled with the desire to develop a successful international tourism and attract more visitors from capitalist countries. Thus, one of the posed goals of my research is to show which is the leading motive in making managerial decisions and in the relations with the "others": the official class-party ideology (which is dominated by the distrust of "the enemy capitalist camp") or the pursuit of maximizing profits and achieving certain economic results, which suggests attracting foreign tourists through hospitality and good service, and ultimately – creating relationship of trust with them. I search for the answer to this problem through an analysis at meso-level.

The archives of „Balkantourist” present the discourse of the government (in official documents) and the senior management team on the problems of the branch. These documents and records demonstrate that at different levels (both vertically and horizontally) within the bureaucracy

tensions and competition existed, which can be described as "segmentation". Their managerial decisions are always motivated twofold: a desire to achieve economic results, on the one hand, and - on the other - to win the trust of the highest level of government - the Central Committee of the Bulgarian communist party and personally Todor Zhivkov¹. The personal contacts with Todor Zhivkov and senior party functionaries were essential and constituted real social capital for the managers at all levels in the field of tourism, and these contacts were often critical to achieving a certain goal or implementing managerial decisions. While in the published materials, for example, in "Balkantourist" journal (1961-1964), issued by "Balkantourist-Sofia" enterprise, there is an obvious effort for demonstrating loyalty towards "the party line" - the decisions of the party forums are cited and the official class-party rhetoric is supported, the protocols from the meetings of the managerial team of the tourist sector reflect a far more pragmatic discourse. In the late 1980s the managers cited phrases from the speeches given by Todor Zhivkov, Mikhail Gorbachev and from party documents in order to support their arguments and demonstrate loyalty towards the party and state leaders, but at the same time without any ideological prejudice they discussed the modernization of the material basis, the opportunities for coping with the deficit of goods, for increasing the currency revenues, for "adopting the foreign experience" (having in mind mostly the Federal Republic of Germany, Austria, and Finland – capitalist counties with developed winter tourism).

Secondly, the international resort is interesting as a space of specific work world that is different from that of "ordinary people" in the country. The work world in the international resorts² is dominated by the contact with foreigners, a typical consumer culture and by the specific interplay of formal and informal relationships forming the work culture which cannot be seen neither in the public administration nor in factories, education or health care sectors of the socialist Bulgaria. This is a picture that is revealed by examining the micro-level. The ethnographic field work included observation, biographical and in-depth interviews with the men and women working in various positions in the tourism business - smallholders, tenants of restaurants and shops, staff in hotels and restau-

¹ Todor Zhivkov was the Secretary General of the Bulgarian Communist Party (BCP) (1954-1989) and the chairman of the Council of State of the People's Republic of Bulgaria (1971-1989).

² In the socialist Bulgaria these are the mountain resorts – Borovetz and Pamporovo, and the resorts on the Black Sea coastline - destinations for summer tourism.

rants, middle and senior managers. They are of different ages, many of them have experience from the previous period and during conversation they constantly make a comparison between the situation before and after the “10th of November”³. These people call the socialist period of their work biography “the time of Balkantourist”.

“Balkantourist” was a state enterprise – a mega-structure for domestic and international tourism which experienced its heyday in the 1970s and 1980s, and is emblematic of tourism in the period of socialism⁴. To find out more about daily life and working life in “Balkantourist” I met with men and women who are already retired, but were employees of the company in the years of its prime. Their memories, shared in the context of their present biographical experiences, are a major source of information on the social practices of micro-level. Particularly impressive is the contrasting presentation of the life and work today in the resort in comparison with those of the era “Balkantourist”. The interviews are a very good source for understanding the notions of “good life” (Scarboro 2011; Bren, Neuburger 2012; Taylor 2006) in the context of working in the international resort during the period of late socialism and for analyzing the postsocialist nostalgia (Todorova, Gille 2012) expressed by former employers of Balkantourist. These goals locate the research at the intersection point of organizational studies, studies of work culture and everyday life in the period of socialism and post-socialism and studies of tourism in the Eastern Bloc.

In the following sections I will try to argue that the culture of informality and related attitudes of trust and distrust are very important part of the work culture in the tourism sector in Bulgaria in the period of late socialism (1.). The next objective of this study is to show how through the world of work, generally understood as a sphere of employment, the relationships of trust/distrust were created; (2.) how the regime of trust and distrust was associated with consumption and the perception of “good life” in the late socialism and (3.) how the classless socialist socie-

³ On November 10, 1989 at a plenum of the Central Committee of the BCP Todor Zhivkov was released from his post as a Secretary General of the Bulgarian Communist Party and this act put the end of his 35 years long reign. The everyday speech “The tenth of November” signified the beginning of the democratic changes in Bulgaria.

⁴ ‘Balkantourist’ is a state monopolist in the sector of international tourism in Bulgaria. The enterprise is established in 1948 modeled after ‘Intourist’ in the USSR. Like ‘Intourist’, ‘Balkantourist’ had a significant economic function to make profit in hard currency (Salmon 2006, 186-204). For achieving this goal the enterprise underwent a number of transformations in the socialist period; in the 1990s it was privatized.

ty was segmented and a group that felt privileged and loyal to the regime was created.

Theoretical notes

While formality involves the general field of impersonal relations and institutions governed by established rules and laws, informality is applied to a broad range of practices: from small daily services between friends to actions that are played behind the public scene, which - as they were not in line with the official regulation - were seen as a threat to the fair and equitable, having the effect of favoritism, nepotism and patronage (Ledeneva 1998, 2006, 2013; Misztal 2000; БЕНОВСКА-СЪБКОВА 2001; Giordano, Hayoz 2013). In the context of entrepreneurship and entrepreneurial culture, the informal sector is defined as the sum of firms, workers, and activities that operate outside the legal and regulatory frameworks (Misztal 2000; Chavdarova 2013; Luleva 2010). Until recently, the social theory viewed the formal and informal sectors, similar to the public and private spheres, as extreme opposites⁵. The modernist scientific paradigm assumes that the transformation of societies from pre-modern to modern consists in the replacement of the dominant informal, personal, face-to-face relationships with the formal - impersonal, rational, following legal regulations. In this light, public and private, formal and informal are considered as separated spheres and the functioning of informal networks in modern society is interpreted as a sign of backwardness or unresolved pre-modernity (Shlapentokh 1989). This understanding is problematized by anthropologists and sociologists, who recognize the differences between the informal, private sphere of family, friendship and the primary groups, on the one hand, and the instrumental public sphere of formal institutions, on the other, but they find this dichotomy unsatisfactory in explaining the social law and cultural practices (Misztal 2000; Giordano 2013). Anthropological studies of Mediterranean and postsocialist societies of the past two decades show that informality is not a separate field opposite to formality, but its "systematic principle", it permeates all levels of the economy and public institutions (Giordano 2013; Ledeneva 2013; Chavdarova 2013).

More fruitful, therefore, would be the consideration of informality and formality not as opposed spheres and exclusive practices, but rather as two tactics, each serving to deal with the unpredictability of the system

⁵ See for example R. Sennett 2004. On the conceptualization of public/private see the papers in: Weintraub/ Kumar 1997.

(Misztal 2000, 31). Several studies of various informal practices were done on Bulgaria (Benovska-Sabkova 2001, 2003; Petrova 2010; Chavdarova 2013). The thesis argues that the Bulgarian society belongs to societies characterized by public distrust (Giordano 2013), and therefore personal trust has a leading importance for social interaction. In the following I will address the question how do informal social relations and social and personal trust function in the period of socialism in the international tourist resort in the context of the ideological confrontation with the West and the goal for achieving high economic results (to attract tourists from the West). One possible hypothesis could be that the mode of trust and the importance of informal networks are not only influenced by the political and economic context, but - due to their high embeddedness in the social relations - themselves (informal relationships and personal trust) influence the process of economic and political transformation. In this paper I will focus on the mechanisms of their functioning and importance in the period of socialism⁶. I will discuss how during the period of late socialism in the context of mistrust towards the system a peculiar agreement between the regime and those working in the field of international tourism functioned. It consisted in allowing informal practices for material gain and consumer comfort to exist at the workplace - experienced by the workers in this sector as a privilege against their loyalty to the regime. This type of social and political contract is known in other Eastern Bloc countries: it supported "goulash socialism" in Hungary, the "normalization" in Czechoslovakia (Vaclav Havel spoke of the "historical encounter between dictatorship and consumer society"); similar phenomenon in the Brezhnev era is described by James Miller (1985) as "Little Deal"⁷, Alena Ledeneva analyzes the informal relations deeply penetrating the social fabric described as "blat" (Ledeneva 1998). "The case Borovetz" highlights the experiences and everyday practices of a segment of the Bulgarian society and contributes to the knowledge of the "real existing socialism" in Bulgaria.

The Tourist Resort Borovetz

Borovetz is the oldest mountain resort in Bulgaria. It is located in the northern ridges of the Rila Mountain, 70 km from Sofia, 125 km from Plovdiv and 10 km from the closest town of Samokov. In 1896 in the locality of Chamkoria (known under this name back then) the first vaca-

⁶ About the culture of informality in postsocialist Bulgaria: Luleva 2014.

⁷ See also Crowley, Reid 2010; Merkel 1998.

tion house was built. Two summer residencies were built for prince Ferdinand in the beginning of the XX c. – Sitniakovo and Royal Bistrizta. During the 1930s and 1940s Chamkoria was the favorite resort place of the elite from the capital city. In the late 1940s the private villas were nationalized and turned into recreation residences attached to different state institutions – the Ministry of the Interior, the Ministry of Education, the Writers' Union, and other professional unions. In 1948 Borovetz was declared to be a republican resort; the propaganda underlined that the resort had broken with its past as a “closed aristocratic and bourgeois summer resort”⁸. During the 1960s the first three hotels were built and welcomed guests from the socialist countries (Poland, the Czechoslovak Republic, and the GDR) and tourists from Western Europe. During the socialist years Borovetz became the biggest Bulgarian mountain resort developing international tourism. Winters were mild, with abundant snowfall, allowing for practicing ski sports from December to April. The resort was promoted as a ski centre; several ski slopes were constructed and during the 1980s Borovetz hosted the World Cup competitions in Alpine ski disciplines. Therefore two main forms of tourism were developed in the resort during the socialist period: international (business) tourism, carried out by the tourist complex "Balkantourist", and the social tourism and "recreation" aimed at Bulgarian nationals, carried out by the "Recreation and resort treatment"- Borovetz together with the profes-

⁸ Mitreva, Nikolov 2018. During socialism brief historical notes on Borovetz were published in two small guide books: „Borovetz“ by Ivan Borov, State Publishing House “Medicine and gymnastics”, 1962 and „Resort complex Borovetz“, by Ruen Krumov, published in 1985 by the Central council of the Bulgarian professional unions. Borov emphasized that the first summer houses were built by “the rich” and “the alien prince”, attracted by the healthy climate. In 1944 in Borovetz 160 villas had already been built. “The people... is not welcome in this aristocratic and speculative nest”, Burov wrote and continued: “after the declaration of the unfortunate symbolic war that caused the air attacks on the capital and its destruction, Borovetz was the shelter of the main military headquarters and all the diplomatic and political activities in Bulgaria. There ministers, generals, high officials and diplomats took refuge cowardly and guilty immersing their fear and misgivings about the proximal end in noisy revelry and debauchery” (Borov 1962: 8). There is a contrasting depiction of the image of the resort after the nationalization of the villas in 1948: “the nationalized villas opened wide doors and a big wave of the Bulgarian people, the indisputable and legitimate owner, entered together with the bright mountain sun in them. ...from this moment Borovetz started its real and full blooded life and gained the right to be called Borovetz resort, a place of healing and relaxation for the working people, for the entire Bulgarian nation” (Borov 1962, 11).

sional unions and the Bulgarian tourist union. Mostly foreign tourists⁹ were accommodated in the hotels of "Balkantourist". Bulgarian citizens rested in rest homes, chalets and pioneer camps¹⁰.

„Balkantourist“ – the showcase of the Bulgarian socialism

In the resort Borovetz the whole package of services in tourism - hotels and restaurants, transport, ski facilities, infrastructure and tourist services – was provided by the state enterprise "Balkantourist". It was created in 1948, and until 1991 when it was privatized, went through several stages of structural rearrangements in the industry, motivated by the authorities with the need for better coordination of the work of the units¹¹. "Balkantourist" is managed by the General Department of Tourism (GDT), later – by the Tourism Committee, equivalent to a Ministry. The international winter tourism in the resorts of Borovetz and Pamporovo and the summer tourism on the Black Sea coastline were given special attention as industries profitable in foreign currency and were considered the "calling card" of Bulgaria. Their development was accelerated since the mid 1960s. In 1966 a Decree № 56 of the CM was approved - it provided a number of measures "to further the development of international tourism in Bulgaria". A national goal was set to increase the "flow of foreign tourists in the country" and it was stated that "the construction of international tourism is given full priority". It was allowed to DSO "Tourist" to perform wholesale "in direct supply of commodity funds for the needs of international tourism" and recommended "DSO "Tourist" to be supplied with food and industrial goods of the highest quality. If necessary, it was possible to get direct commodities from the contingent of goods for export". The task was ordered for the trusts in the light and

⁹ In 1983 in the hotels of Balkantourist 41 109 people stayed for 146 485 nights – out of them 41, 18% were tourists of the capitalists countries, 29, 87% - tourists from the socialist countries and 28, 93% - Bulgarian tourists. The statistical data indicate that the tourists from the capitalist countries relaxed for the longest term (R. Krumov, *Resort complex Borovetz*, Sofia, 47).

¹⁰ In 1983 in the rest homes, pioneer camps and mountain chalets 17 588 people stayed, out of them - 8 606 for a long term rest (from 7 to 14 days) and 8 952 people for a short term rest (from 1 to 6 days) (

¹¹ In 1965 DSO „Balkantourist“ for international tourism was renamed to United Trade Enterprise for International Tourism „Balkantourist“ under the management of the General Unit (GU) for tourism. Under the GU for tourism there was as well the united trade enterprise „Rodina tourist“, which developed domestic and international tourism with exploitation of auto transportation. While „Rodina tourist“ served Bulgarian citizens, foreign tourist were hosted in „Balkantourist“ hotels.

food industry, in cooperation with the GDT, to open "show stores"¹² in the resorts for the sale of goods and souvenirs". It was recommended that the Union of Bulgarian Artists opened such stores under the same conditions. The GDT had the task to coordinate the activities of all ministries, departments and organizations on issues related to tourism development.

Decree № 56 in later years became popular among Bulgarian citizens and was of great importance for the development of the tourism sector. It contains text revealing the political and ideological framework within which international tourism was placed. Item 16 says: "To make the entire population acquainted with the tasks of tourism and to enhance patriotism and national resistance against foreign influences, to conduct extensive educational work such as: the Ministry of Education included in the curriculum lectures on international tourism; the GDT organized through the Committee for assistance and tourism development special discussions with citizens in tourist areas in service of foreign tourists. It is offered to the Central Council of Trade Unions, the National Council of the Fatherland Front and the Central Council of the Bulgarian Tourist Union to organize in their subordinated organizations appropriate lectures and discussions on the importance and development of domestic and international tourism" (Central State Archives, ф. 1230, оп №1, а. е. 2, p. 6). The text is devoid of class and party vocabulary that is usually present in official documents. The Decree of the Council of Ministers considers international tourism as an important, beneficial to the country industry. It is, however, accompanied by threats for the "patriotic feelings and national stability" of the Bulgarian people. It is therefore recommended to have broad explanatory and educational work by the mass organizations (Unions and the Fatherland Front).

Throughout the period of socialism the government used international tourism as an excuse for some unpopular measures of its domestic social and pricing policy: for example, periodically and informally information was disseminated that foreign tourists found everything "very cheap in Bulgaria" and so, the prices of some food products should be

¹² „Show stores“ were an invention of the socialist trade and consumer policy. These stores offered the best commodities of the Bulgarian light and food industries produced for export to the other counties of the socialist bloc: textiles, porcelain, and most often – food commodities, fruits and vegetables. Amid the constant shortage of these goods at the average markets, the show stores, several in number located at the center of the state capital and major resorts, were intended for creating a positive image of the country in the eyes of foreign tourists.

raised. With the need "to do well in front of strangers" the priority supply of scarce goods and food commodities in the mountain and seaside resorts was explained. The problem with the supply of food and quality products proved an intractable issue all through the whole socialist period, even though attempts were made to harness the available resources and the problem to obtain resolution from the highest central level. By decision of the Council of Ministers from 20.11.1972 it was ordered DSO "Wholesale" to serve the commodity fund of DSO "Balkantourist"; DSO "Bulgarplod" to ensure priority supply to resorts with greenhouse and field early fruits and vegetables at requests made by DSO "Balkantourist." It was allowed to DSO "Pirin", DSO "Rila" and DSO "Textiles" to provide the resorts by arrangement with appropriate amount of luxury goods intended for export. (Central State Archives, a.e. 4, c.17). The organization of work in the industry was built on the principles of centralization and strict hierarchy. In the early 1980s the General Department of Tourism was transformed into the State Tourism Committee entrusted with exercising overall control of tourist services in the country. The Committee assumed the organization of the national system for reservation of the total housing used for domestic and international tourism. It coordinated and controlled the retail commodities in foreign currency in the shops of Foreign Trade Association "Corecom" and imported goods in BGN in the stores of „Transimpex”. The activity in the sector was subjected to the "state planning tasks" approved by the Council of Ministers.

In 1983 another decree of the Council of Ministers (№ 45) states that the CC and the Government of the People's Republic of Bulgaria "take permanent care for the development of tourism and recreation to become an active factor in maintaining and enhancing the vitality and the working capacity of the people; to achieve social, economic and monetary efficiency". It was reported that the annual number of people who went on vacations exceeded 2.5 million Bulgarian citizens, who were offered 32,000 beds in hotels and motels, 14 000 - in camps and 100,000 in private housing. The document stated that Bulgaria was a "country of international tourism: in reality it carried out the idea of fruitful cooperation between the peoples of the world. Every year it is visited by more than 6 million foreigners". A number of failures were acknowledged: "it is used inefficiently, slowing its renovation, reconstruction and modernization. The quality and culture of services are dissatisfactory. The training and qualification of the staff do not meet modern requirements. The foreign exchange income and the effectiveness of international tourism are dissatisfactory". To solve these problems ("to achieve greater social

and economic efficiency") a new mega-structure was created: the Bulgarian Association for Tourism and Recreation (BATR).

Since 1.01.1984 the BATR was attached to the business organization Tourist complex "Balkantourist." To increase foreign currency revenue, the Ministry of Commerce and the BATR were instructed to take "time-bound measures to improve the trade" in stores of the FTO "Corecom" by saturation with demanded goods, opening new stores and catalogue sales. The sale of goods in convertible currencies to foreign and Bulgarian citizens in shops was allowed without limitation of nomenclature (Council of Ministries Decree № 45/23.07.1987)¹³. One year later it was noted that the stores of the FTO "Corecom" made violations, the prices of certain goods were arbitrarily increased ("Everything is out of control"), but the foreign currency trade had fulfilled its plan. Overall the foreign currency plan was realized with 105% (an increase of 3%) as the number of tourists from capitalist countries increased (in total 77 500), and the number of organized tourists from socialist countries decreased - the USSR, UPR, PPR, ČSSR (44 300).

The situation in the branch was discussed at the same meeting of BATR in October 1988, and statements, unimaginable before, were made. Referring to M. Gorbachev, the head of BATR said: "This is a new vision of socialism. Let's get the land back to the owners. Without capitalism we cannot develop socialism and scientific progress". In the spirit of perestroika, it was insisted that tourism industry "be developed according to the economic principle, not the fictional one" (i.e. the economic logic should prevail, not ideology and party "assumptions"). A decision was taken to lease some sites. The management of BATR was trying to defeat the criticism coming from the Council of Ministers and the Central Committee of the BCP on the results of the FTO Corecom and insisted the Corecom also be based on the business principle: "when we created Corecom we aimed at revenue of 250 000 BGN, now we aim at 80 million BGN" "to have a minimum price – below it - for the state, over it - for the enterprise". Managers recognized that "we are far from the developed capitalist countries, from Yugoslavia, Hungary, the Czechoslovak Republic," and agreed that the decision was "to leave Corecom to trade, to take its commission! We want goods!"

¹³ The special stores for imported goods traded for hard currency were known in the USSR, Czechoslovakia, Poland, GDR, Bulgaria (Merkel 1998; Zatlin 2007). On the culture of consumption, related to FTO "Corecom" in greater detail – see Guencheva 2009.

At the next meeting the same year, the President of BATR recognized that the reorganization of the sector had not produced the expected results, the existing weaknesses had not been removed: "provision of goods - poor or average, transportation – poor, service quality – poor and this is marked by all contractors - both socialist and capitalist, Hungarians refuse to come to us". He again quoted M. Gorbachev that "the socialist model does not work. We have to get the individual back on the land, or the land back to the individual" - the leitmotif of the whole activity until now" (Central State Archives, a. e. 21, p. 149).

The heads of the tourism sector were trying to combine two approaches in seeking a way out of the impasse created ("There are no resources, but the plan must be implemented"): the first approach followed the new economic policy, the other – the familiar party-bureaucratic. The economic solution was to give the tourist sites under lease ("The key is the lease and the accord... Personally, the man has to be interested in his work. If we don't do it then we have not done anything. Sites should be given under accord"), and thus the process of decentralization began. Furthermore, following the party-bureaucratic approach, it was decided to make an attempt at recognizing tourism as a priority sector by the party and state leadership - for this purpose it had to be included in the upcoming speech of Todor Zhivkov to the party plenum (the supreme governing body of the Communist Party) ("We develop a special report to comrade TZ for a radical change of attitude towards tourism. And in the new material of comrade TZ to the plenum, tourism is placed as an important industry complex").

By the end of 1989 the problems with food supply, hotel equipment and quality of tourist services remained unresolved. "The service is desperate, the managers and staff have no interest," admitted the President of BATR at a meeting. The managers of the industry faced the impossibility to impose tighter control and accountability and reduce the foreign currency exchange: "And the black exchange – everyone - from maids to directors - participates" (Central State Archives, a. e. 21, p. 74).

By rule the personnel of the international resorts was recruited from the graduates of the International Tourism Institute in Bourgas, and later - specialists majoring in tourism related subjects from several Universities. The Institute in Bourgas offered courses aimed at upgrading the qualification of those employed in the sector. Tour guides, waiters, ski trainers were encouraged to attend these classes outside of the tourist season through extra pay and favorable conditions. The training and extra qualification courses were one of the biggest "assets" of the "old system"

for preparing personnel – emphasized by all who worked their way through this system. In this way qualified staff with good cultural capital in tourism was produced and specifically trained to deal with foreigners at the Bulgarian resorts (speaking foreign languages was a basic requirement).

The high formal criteria for getting a job at the big hotels, managed by “Balkantourist”, were not always strictly observed. In some cases, party membership and close friendship connections with the director of the complex, hotel or protection from “high places” was enough for obtaining the desired position. Education and experience in tourism were not the lead criteria in appointing directors at the complex – their selection was indispensably party motivated. Some of the directors had been managers of industrial enterprises in Samokov before, others had had no experience in management at all – they had come from the school for preparing party leaders – ASSSM (Academy of Social Sciences and Social Management, known also under “Advanced Party School”).

In the three hotels of Borovetz – “Bor”, “Edelvais” and “Musala” – international tourism was developed year-round. The accommodation base of the hotels was occupied by western tourists during the winter season. In summer this base was available to guests coming from the socialist countries – the GDR, the Czechoslovak Republic, Poland and the USSR. The reservations, even though arranged officially by the foreign trade association in the Committee of Tourism, were also influenced by personal connections and exchange of favors between the officials in charge of the complex’s sector, the headquarters in Sofia and representatives of the tour operators.

“Borovetz was hardly accessible during winter. Sometimes the arrangement seemed like extortion: – “we will give you 1 million tourists from Poland for the Black Sea during the summer in exchange for 1 group at Borovetz during the winter”. (woman, 65)

The priority given to tourists from capitalist countries for the winter season, which obviously was in greater demand, followed the economic logic and the pursuit of profit in hard currency, not the political “brotherhood” with the countries of the socialist camp. Making profit in hard currency was done through additional services (excursions, theme evenings with a special program) and trade in the shops of “Corecom” located in the major hotels of the resort.

At “Balkantourist – Borovetz” people from the nearby town of Samokov were employed as tour guides, cooks, waiters, bar tenders, ski instructors, administrators, managers and staff. The resort also offered

jobs to men and women from other parts of the country sent there by allocation after graduating from the institute of tourism. Some of them worked in the complex during the winter season, while during summer – in the hotels of Balkantourist along the Black Sea coastline. The staff used a separate residence hall in the resort. In the years of late socialism working in “Balkantourist-Borovetz” was prestigious since it provided access to resources out of reach for common citizens outside the resort. For that reason, in many cases the selection of personnel was based on informal (friendship, kinship) ties. The interviews emphasized the professional qualities of those employed at different positions, the good staff preparation and qualification as well as the enthusiasm in serving guests which sometimes compensated for the deficient material conditions (e.g. cuts in electricity and water in the resort).

According to an ex-manager of the complex, the work organization was good and rationally motivated (for establishing ski school, for example, Austrian expertise was used), but the work was undermined by informal practices.

“In tourism you work hard, get paid little, but you live well”

These words spoken by a manager in tourism with long experience during socialism best describe the experiences of men and women working at “Balkantourist-Borovetz” before the privatization in the complex from the mid-90s. Many examples were presented about establishing personal contacts and offering services to guests in exchange for which the employees (tour guides, but also shopkeepers, drivers, maids, hairdressers) received thank letters and lots of presents – cash, clothes, food, drinks, cigarettes, cosmetics – all these products fell in the category of goods deficient for Bulgarians. In brief, services in the sphere of international tourism turned into a profession in which formal and informal practices were blended and complemented with the purpose of achieving maximum gain for the employee, not for the enterprise. It was rare to find cases when the diligence of employees produced profit for the enterprise – one of these cases was offering additional service to groups – tour guides organized excursions according to established routes in the mountain or at national tourist sites. Servicing tourists was not limited to the formal duties of the personnel. Personal contacts and gift exchanges occurred between staff and tourists. For some jobs (for example, tour guides and waiters who came in direct contacts with the tourists, but others as well) the tips and gifts received by the tourists many times exceed-

ed the work wage¹⁴. Respectively, the appointments for these jobs – especially for the jobs requiring less qualification, but producing good “side” revenues such as waiters and bar tenders – occurred after inclusion in networks of mutual obligation and patronage. Instrumentalizing informal relations with clients was a considerable deviation from the rules of behavior introduced for staff much later (“now the maids are not allowed to speak with the guests”).

At the eve of restructuring and privatizing the complex, a wide range of informal, semi- and explicitly illegal practices were developed for producing additional incomes – through the relations between staff and tourists on the one hand, and on the other – among the employees. The latter were mostly related to appropriating deficient products supplied in the restaurants and hotels of the complex, through getting use of the so called “ties” – an informal institution which according to T. Chavdarova could be defined as «in-formal rules for building and maintaining of personal commitments and loyalties in a formal environment” (Chavdarova 2013). We could say that there was a kind of “hierarchy” in relationships: “the strongest bonds” were those with the members of the CC of the BCP and Todor Zhivkov. Sometimes only the information that an employee or a director was “close to the Head of State” was enough to give the official comfort at work (“nothing they could do to me, because I was close to Todor Zhivkov”). “Weaker”, but numerous and in a dense network, were the “connections” with the lower levels of the bureaucracy. Within the network of “ties” personal, friendly relations were instrumentalized for doing mutual, reciprocal favors among the employees in the resort. The strength and significance of personal relations and informality at the workplace grew in proportion to the increase in need for ties for resolving a personal problem (accessing a product/service, getting a job). For example, the suppliers (buyers) had a key position: they made purchases from warehouses all over the country and supplied the food products, materials and equipment necessary for the restaurants and used for maintaining the hotel rooms. A portion of the supplies was “diverged” for the personal needs of those employed in the management, but also for inferior staff. I will quote another example:

¹⁴ According to Kristen Ghodsee “receiving tips was perhaps the most important benefit of tourism employment” (Ghodsee 2005, 98); the author cited respondents who evaluated working in ‘Balkantourist’ as a privilege because of the access to hard currency.

They made deals... since they worked directly with the tourists. Now they don't have such immediate contact with the tourists... for example they signed 32 tourists for an excursion but officially – 2-3... but it was done at the end. At the beginning they worked with "bath tickets" ...who paid, who reported, who didn't report, you never knew... but there was a risk as the Committee of Tourism had a control department that checked how many tickets the tour guide collected and what the number of people in the bus was... then we made them carry their driving license. Meals were signed on check books, they found ways of making replacements, and on the side they received cigarettes, drinks, cash. (woman, 70)

Perceived as legitimate, the vertical (patron) and horizontal relations of mutual favours and reciprocity – from getting a job to supplying deficient goods and evading the rules of reporting – in reality replaced the formal, impersonal relations at the workplace with informal, personal. These were features of the communist culture of privatism (Misztal 2000), in which the workplace becomes a tool for using public resources for private needs, as the personal relations of trust are stronger than the work relations. These relations in some cases are at the core of social exclusion and denial, and in other cases – of inclusion and granting opportunity. And last but not least – in this work culture, woven and dominated by the network of informal relations (*vrazki*), the awareness of the connection between the personal and collective interest is quite weak. The sense about the gap between the private and public interest has intensified in the postsocialist period.

The work environment, created at the resort, had influenced (and was related to) the establishment of a specific living world in which the everyday problems of deficit were resolved more easily, in which there was a specific consumer culture close to the West, affected by the contact with the western tourists and the access to products from the hard currency shops. In every hotel there was a shop from the Corecom chain in which drinks, clothes and other material objects were sold for currency. These products were missing from the commercial system in the country, but accessible to workers in the resort. This was a material world that induced elitist sentiment among workers from the middle echelons and the managers in the complex (*"they could not imagine going back downtown"*) and in general constructed a working environment different from that of the common Bulgarians. Cases of employees voluntarily quitting jobs in the complex were exceptional. The employees of Balkanturist felt privileged because of the better material standard achieved thanks to the

informal practices tacitly admitted by the managers based on reciprocity and personal trust of each other and the foreign tourists. In the period of late socialism the access to currency and goods in Corecom was no longer viewed with ideological distrust. The managers of Corecom aimed at increasing the revenue, and the black market of currency, though illegal, was a widespread legitimate practice. In the 1980s the acquisition of western goods (clothing, cars, etc.), wearing western clothes had no political meaning of opposing the regime. On the contrary - for the employees in Balkantourist the western goods and loyalty to the system were cumulative values¹⁵. Having domesticated (Creed 1997) the system, they lived in a comfortable life world.

Conclusion

The case of the resort Borovetz makes it possible to go into the depth of the social relations and cultural practices in the tourism sector in the period of socialism. The analysis of archival sources and memoirs of employees at 'Balkantourist' reveal the high level of legitimacy, which benefited the regime and the ruling communist elite among those working in international tourism. Moreover - between the elite and the officials of Balkantourist hotels personal relationships of trust and patronage were often established. In addition to that was the privileged position of the employees at the resort who had access to scarce goods and contacts with foreign tourists, making them a more peculiar category of Bulgarian citizens - a "segment" loyal to the regime and occupying a different living world from that of the majority of Bulgarians. The 'good life' of the 70s and 80s, which was nostalgically remembered by my respondents was built on reciprocal relations of personal trust and was marked by material comfort, conformity and loyalty to the system. That was their "Little Deal" with the regime. There was no place for class-party ideology.

In the postsocialist period some of the informal practices, familiar from the socialist times, such as the reciprocal services of supplying scarce goods, black market trade with currency, informal relations with tourists, appropriating various goods and food from the depositories of hotels and restaurants, etc. have lost their meaning in a market economy and free access to goods. Other practices such as party patronage, personal loyalty, buying access to sources of income, have gained new

¹⁵ On reconciling values in late socialism in Bulgaria according to the example of the phenomenon "The exchange market" see the analysis in Ganey 2014.

strength and produced exclusion (for non-"our people") from the otherwise free market and procedures, formally available to all. The resentment, expressed by almost all of my respondents, that the things are not "right" and the resort perishes. Thus they demonstrated their disagreement with the existing order, but that still does not mean that they themselves would not follow the "rules of the game".

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The Role of Women in the Educational System of Turkey after WWII

Abstract: *The study of women's issues, the feminist movement, as an academic discipline, and the first curriculum were established in the University of San Diego in 1970. The women's problems have been mainly studied in the framework of traditional social and humanitarian disciplines, mostly in literature, philosophy and psychology.*

The active dissemination of feminist ideas in Turkey after World War II, especially in the late 1970s, and the creation of various feminist societies and journals provided a solid foundation for the establishment of research centers in universities, that study women's issues.

There are two directions in the study of women's issues in Turkish universities and academic circles. The first one includes research centers that bring together representatives of various disciplines and fields of science. They deal with gender, the economic and social status of women, education and health. The second approach combines all those trends that are associated with the social faculty.

The level of female activity in Turkey is much lower than in Europe. The status of a woman here is also characterized by its specific development.

In the 1980s and 1990s, the feminist movement in Turkey became more and more active. New women's communities, magazines, newspapers, libraries were created, and women's conferences with an active participation of Turkish women were held both in Turkey and all around the world.

It can be concluded that the women's movement in the higher and academic system of Turkey after World War II led to a new political process that raised the issue of gender equality. The struggle of women for emancipation played an important role in the formation of Turkish society.

Despite some achievements regarding women's issues, there is still gender inequality, violation of women's rights in Turkish society, what indicates the fact that the women's problems are still relevant in republican Turkey.

Key words: *female role in Turkey; feminist research centers, higher and academic fields of Turkey.*

Since ancient times, the problem of establishing equality between men and women has been of great interest to representatives of various fields of science. Determining the place and role of a woman even indicates the level of development of the society. Women's rights in different countries depend on the level of social, political and economic development of a particular country, religious beliefs and other factors.

The change of times was accompanied by a reappraisal of social norms, traditions, customs and a fundamental shift in thinking. The problem of women became relevant in the 19th century. The women's movement, which began in Europe, soon spread throughout the world. Women had to overcome great difficulties in the struggle for emancipation. The struggle for freedom did not pass without bloodshed, and the outstanding leader of the feminist movement, **Olympia de Gouges**, was sentenced to death. Feminist practice has accumulated rich experience, which required some theoretical research. Such a theoretical basis turned out to be feminist theories.

The emergence of women's studies as an academic discipline is associated with the first wave of the feminist movement. The greatest influence was exerted by the book of **Simone de Beauvoir** "Second Floor". The first curriculum for women was adopted at the University of San Diego in 1970. The problem of women was mainly studied in the framework of traditional, social and humanitarian disciplines, basically in literature, philosophy and psychology. The first requirement of feminists to universities was the inclusion of women's issues in curricula, study materials and catalogs of publications.

In traditional social and humanitarian disciplines, the thesis of "adding women" was due to an analysis of the fact that for centuries women were excluded from social discourse and were associated only with the family sphere. However, it soon became clear that "adding women" to the public consciousness was not enough, since no traditional discipline was "ready" for an absolute perception of a woman's life. University teachers and scientists realized that it was necessary to develop more focused and independent programs in the field of women's studies, which would examine the lives of women on the basis of the so-called "female experience." As a result, many universities have created faculties, centers and departments, where it became possible to study the world as a whole, from a female perspective. It is this feature that distinguishes women's research programs from the departments of sociology, psychology, economics and history [Paker 1991, 73].

In the 1980s, the main attention was not only paid to the understanding the role of women in the public sphere, but also to the question of rethinking the knowledge of traditional disciplines.

Since the 1980s, research on women's issues began from a multicultural perspective. Conceptual issues, related to racial, ethnic and sexual minorities, have been reconstructed.

The active dissemination of feminist ideas in Turkey and the publishing of feminist magazines in various areas in 1980 created a solid foundation for the establishment of centers for the study of women's issues at universities [Tekeli 2010, 93].

In 1990, the problem of women was considered in terms of globalization. Educational programs and projects on women's issues began to spread in Western Europe, the Middle East, Africa and Asia. And this, in turn, made it possible to study and share information. International summer schools were created, international conferences, postgraduate studies and doctoral studies were held [Buskivadze 2013, 92].

Turkish universities work in two directions in the field of research on women's issues. The first group includes research centers that bring together representatives of different disciplines and research areas. They deal with issues of gender, education, health, economic and social status of women. The second group includes areas that are subordinate to the social faculty.

In Turkey, centers for the study of women's problems initially existed only at the universities of Ankara and Istanbul, and in the 1980s and 1990s there were opened the following centers: "Center for the Study of Women's Problems" at the University of Chukurov; "Center for the Research and Study of Women's Issues" at the University of Gaza; "Center for Research and Study of Women's Problems" at the University of Gaziantep; "Center for the Study of Women's Issues" at Chankai University; "Center for the Study of Women's Issues" at the University of Mersin; "Women's Studies Center" at Eskisehir University; "Center for the Research and Study of Women's Issues" at the University of Hajetep, etc. In addition to working on various projects on women's issues, the centers hold various conferences and symposia. Research centers, on the one hand, seek to bring out and study the problems of women in the academic sphere, and, on the other hand, organize debates and discussions on active issues in the light of theories and forms of thinking.

In 1989, the University of Istanbul established "Center for the Research and Study of Women's Problems", which examined issues related

to the role of women in education, culture, healthcare, economics and politics.

In 1992, "Center for Research on the Use of Women's Labor Force", which deals with women's employment, opened at the University of Marmara.

A special attention should be paid to "Center for the Research and Study of Women's Issues", created at the University of Ankara in 1993, the main purpose of which is a more informed attitude and understanding of the issue of gender in society, and "Center for the Research and Study of Women's Issues", established at Aegean University in 1996, which aims at raising awareness of gender equality in civil society [Bukuri 2012, 113]. These universities have master's and doctoral studies in gender studies.

Like European countries, feminist movements of radical, liberal and socialist (Marxist) tendencies were formed in Turkey in the 1980-1990s.

Representatives of demand reassessment of patriarchal values and call for unification around the problem of women. According to radical feminists, patriarchal ideology discriminates against women in the following areas of life: 1. house that is considered a woman's personal sphere; 2. public gathering places and the alarming situation on the streets (Ottoman women also emphasize the problems connected with the appearance of women on the streets, where they feel uncomfortable under the insulting looks of men); 3. humiliation during sexual intercourse; 4. marginalization in professional life; 5. neglect of women's employment in the economy, politics, culture and other areas.

The slogan of radical feminists is "If the future is ours, then the future is in the woman." Unlike other feminists, they have a female body, voice, beauty, tenderness and other similar qualities in the foreground. Their followers are united around a feminist magazine „Feminist haftasonu“ (Feminist Weekend).

Representatives of liberal feminism emphasize gender equality in all areas. In their opinion, the ultimate goal is not superiority over men, but equality with them. Taking a place in the public sphere is a prerequisite for women's freedom. Work is a success for a woman, but most of all, a woman needs economic freedom, because it means freedom of speech and life. The woman's freedom of speech liberates her from dependence on a man; the functions of a man and a woman in the family should be equal, and a woman should be able to make independent decisions; in order to get rid of unwanted marriage, the rules of divorce

should be simplified. The politics of liberal feminism is egalitarian. Their concept of freedom also implies sexual freedom. The issue of virginity limits a woman's personal freedom. According to liberal feminists, a woman has the right to have a relationship with a coveted man, even if she is married. In this respect liberal feminists are very similar to radical feminists. In terms of radicalization, they are even superior. Representatives of Turkish liberal feminism publish the journal "Kadinca" (Feminine).

Representatives of radical feminism attribute discrimination of women to the patriarchal factor, while socialist feminists relate it to the economic factor. They are generally against capitalism, because they believe that it gives men a place in society and women in the family sphere. Socialist feminists began an active struggle for the economic freedom of women under the slogan "Personal is political." They preached the destruction of the family stereotypes that would be possible only in a socialist society. According to socialist feminists, reassessment of the sexual norms existing in Turkish culture is a prerequisite for women's freedom. They are united around the socialist feminist magazine "Kaktüs" (*Cactus*) [Buskivadze 2013, 90].

As we can see, since the second half of the 20th century, the problem of women in Turkey has become more and more urgent. Turkish youth are educated in Europe and the West, and returnees seek to establish European and Western values in their country.

In today's reality, a Turkish woman emerges from her closed lifestyle and becomes actively involved in public life. Although women in many countries of the world do not go beyond the threshold of their homes, Turkish women are actively involved in the reconstruction of the country. A striking example of this is the appointment of Tansu Chiller as prime minister of the country in 1993 [Bukuri 2005, 35].

The early emancipatory transformations in the Republic of Turkey were unfamiliar to European states, but this process in Turkey was developed according to local traditions.

In Turkish family law, there sharply dominate certain rules and outdated traditions, left over from the Middle Ages, that seriously impede the full freedom of women in Turkey.

By geographical location, we are faced with cultural and ethnic differences between the population. This is mainly found in rural areas, for the most part, in eastern and southeastern Anatolia, where a peasant woman is "attached" to the land, she knows little about her rights and

blindly submits to her husband. The state and many other funds are trying to increase the level of women's education in these regions.

The level of female activity in Turkey is much lower than European rates. The status of a woman is also characterized by her specific development. Since the 1980s and 1990s the feminist movement has become increasingly active. Many women's societies, magazines, newspapers, libraries were created, women's conferences, in which Turkish women actively participated, were held both in Turkey and around the world.

Conclusion

It can be concluded that the women's movement has created a new political trend in Turkey, which highlighted the issue of gender equality. The struggle of women for emancipation played an important role in the formation of Turkish society.

Despite some achievements of women, there is still gender inequality in Turkish society, there are violations of women's rights, what indicates that the problem of women is still relevant in republican Turkey.

Based on reality, the increased female activity in the modern era indicates that Turkish women will fully gain their rights and become full members of society in the near future.

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A (Non)Existing Language – Serbo-Croatian after WWII

Abstract: *After the Second World War, Serbo-Croatian was formally declared on the basis of the so-called Novi Sad Agreement (1954). Its demise is connected to the demise of the Yugoslav Federation (1992). The sociological, historical, political and ideological reasons of the rejection of this glossonym (and with it the rejection of the common language) were clearly the decisive factor, but they were not always the same. The Serbs, Croats, Bosniaks and Montenegrins had specific reasons for this. These reasons can be revealed, inter alia, by analyzing a number of declarative, proclaiming, explanatory, defending, shorter or longer texts on the language generated by all the above-mentioned national communities which used Serbo-Croatian as their first (mother) tongue after 1990. The most recent Declaration on the Common Language (2017) is unique in this sense.*

Key words: *Serbo-Croatian Language; Standardization of Serbian, Croatian, Bosnian and Montenegrin Languages.*

I. Yugoslavia

1.1 The Novi Sad Agreement (1954)

The new, communist Yugoslavia, whose “birth” dates back to November 1943, from the second session of the Anti-Fascist Assembly of

the People's Liberation of Yugoslavia (AVNOJ) led by the Communist Party of Yugoslavia, led by Josip Broz Tito, guarantees equality of the four Yugoslavian languages: Serbian, Croatian, Slovenian and the new Macedonian. Such a language policy had been in place for several years after the abolition of the monarchy and the proclamation of the Federal People's Republic of Yugoslavia (1945).

The question of whether Serbs, Croats, Montenegrins, and the Slavonic Muslim population, mainly from Bosnia and Herzegovina, speak two or more different languages, or if they speak only variants of one common literary language – Serbo-Croatian, was once again opened by a survey in the journal *Letopis Matice srpske*, whose results stimulated a meeting of Serbian and Croatian linguists in December 1954. The meeting took place in Novi Sad and was organized by the Matrix Serbica (Matica srpska), which is headquartered there. Today, Croatian linguists, in particular, agree in their assessments that the real objective was to state the need to unify Serbian and Croatian orthography as well as professional terminology, i. e. the factual need to create one functional literary language. Finally, the need for unity was confirmed, the agreed conclusions of the meeting (the *Novosadski dogovor*) could be loosely interpreted as follows:

1) The language of the Croats, Serbs and Montenegrins is one language, so even the standard language that evolved around two centers, Belgrade and Zagreb, is unified, but with two pronunciation variants: Ekavian and Ijekavian;

2) In the case of the naming of this language on official occasions, it is always necessary to express both components (Serbian and Croatian) and thus to use the names *Serbo-Croatian*, or *Croato-Serbian*, or *Serbian or Croatian*, or *Croatian or Serbian* (“srpskohrvatski”, “hrvatskosrpski”, “srpski ili hrvatski”, “hrvatski ili srpski”);

3) Both pronunciation variants are equal;

4) Both graphical systems used – Latin and Cyrillic – are equal;

5) In this spirit, it is necessary to create a dictionary of the Serbo-Croatian language, terminological dictionaries and common orthography.¹

The agreement, although at first glance fair, still contained the seeds of future tensions and friction. Firstly, it did not address the status of the language standard in Bosnia and Herzegovina or Montenegro and,

¹ The whole text see *Novosadski dogovor (1954)*. [online] Available at: <http://govori.tripod.com/novosadski_dogovor.htm>.

on the other hand, allowed the creation and spread of mistakes, that the Ijekavian variant of Serbo-Croatian is exclusively western, i. e. *de facto* Croatian, and that the Serbian variant, i. e. eastern, is only Ekavian. This, in turn, influenced both the language of the Croats, to which began to flow through the Ijekavian “channel” several Ijekavian as well as Serbian expressions (e. g. Serbian *bezbednost* (ek.)/*bezbijednost* (ijek.), “security”, but in Croatian it is *sigurnost*), and the language of Serbs outside Serbia (and perhaps also Montenegrins), who, in turn, feared that their language would be considered a “western variant” in view of the Ijekavian pronunciation, and would thus be exposed to Zagreb’s normative superiority, i. e. Croatian influence. On the other hand, the Novi Sad agreement actually acknowledged the pluricentric character of the language, which could be either western, i. e. the Croatian variant (exclusively Ijekavian), or eastern, i. e. the Serbian variant (mainly Ekavian).

1.2 Declaration on the Name and Status of the Croatian Literary Language (1967)

The political disintegration in the second half of the 1960s as well as the dissatisfaction of a significant proportion of the Croatian professional and cultural public with the status of the Croatian language in Yugoslavia, resulted in the writing and publication of the “Declaration on the Name and Status of the Croatian Literary Language” (*Deklaracija o nazivu i položaju hrvatskog književnog jezika*), written in March 1967.² Its main objective was to achieve an amendment to the Constitution of the SFRY in the sense that it is clear that there are four constitutive languages in Yugoslavia: Serbian, Croatian, Slovenian and Macedonian. The declaration was signed by many Croatian cultural and scientific institutions. The immediate reaction from the central authorities was to reject it. One can say that the declaration was one of the impulses of the outbreak of the so-called Croatian Spring (1971), which meant an upsurge in Croatian national consciousness (or nationalism – depending on the point of view) against its stigmatization and the forced Yugoslav unity, for which Croats often saw Serbian assimilation policies. However, the process of unraveling mainly from the political causes of the maintained unity of Serbo-Croatian had already begun. The theoretical underpinning of the articulation of Croatian law on its own existence was primarily prepared by linguist Dalibor Brozović (1970, 1997 [1971]).

² The original text with comments e. g. *Deklaracija o nazivu i položaju hrvatskog književnog jezika: građa za povijest Deklaracije*, 1997. Zagreb.

II. Croatia

II.1 Memorandum of the Matrix Croatica on the Croatian Language (1995)

The official status of the language in Croatia, as defined in the 1990 constitution, was also confirmed in the revised constitution of April 2001. In addition to intra-Croatian disputes and exchanges of opinion, particularly in the 1990s, Croatian linguists, writers and other culturally active persons strongly demonstrated the desire to defend their own newly-acquired independent language from attacks from their Serbian counterparts. Evidence of these political clashes taking place in linguistics can be found in the “Memorandum of the Matrix Croatica on the Croatian Language” (*Promemorija o hrvatskome jeziku Matice hrvatske*), written in December 1995 (i. e. during the peace talks in Dayton and Paris on the end of the war in the territory of the former Yugoslavia, but mainly in Bosnia and Herzegovina). The Memorandum as a whole advocates in particular the right of the Croatian language to independence; it attempts to prove that the Croatian language is different from Serbian in all directions, although both languages are very close, and the analogy of Croatian vers. Serbian can be seen in such pairs as Dutch vers. German, Norwegian vers. Danish, Slovak vers. Czech. The text is divided into three chapters and does not have a specific author. According to the Memorandum, the Croatian language has included Shtokavian, Chakavian and Kajkavian dialects since the 14th – 15th century. Vuk Stefanović Karadžić, during his work on the contemporary Serbian literary language, was inspired by the Croatian literary language, its dictionaries and grammar manuals, which, according to the authors of the Memorandum, “Facilitated the expansionist efforts of the young Serbian state”. Unlike the approach of Serbian nationalist statements (see below), whose authors seemingly try to approach the whole issue scientifically, Croatian authors, on the contrary, rely on the views of “modern sociolinguistics”, and emphasize the important, if not fateful, role of cultural, historical, social, political, economic and psychological factors, and most of all the will of the speakers of the given language. Similar to the Serbian nationalist linguists, even these Croatian ones do not positively favor the glossonym *Serbo-Croatian*, because it represents a unit on which “the Great-Serbian administration and diplomacy of the first and second Yugoslavia persisted”. The Croatian nation defied such a name for its language and finally rejected it in 1967 with a well-known Declaration (see above). Part of the resistance against the real and presumed demands of the Serbs is often the repeated assertion that the Serbs have their current literary

language on the basis of the Shtokavian dialects since the 19th century thanks to Vuk S. Karadžić (previously they expressed themselves with various variants of the Church Slavonic language), whereas Croats have “for almost a thousand years, documented writings and literature in their native language”.

II.2 Croatian Academy of Sciences and Arts on the Croatian Language (2007)

In January 2007, the Department of Philological Sciences at the Croatian Academy of Sciences and Arts (Razred za filološke znanosti HAZU) prepared a text with the lapidary name “Croatian Language” (*Hrvatski jezik*), which was published in the second issue of *Jezik* in April of the same year. Compared to the Memorandum, it is much more extensive and more detailed, in its own way it could be understood as a more comprehensive encyclopedia providing information on the history of the Croatian language. Attitudes and opinions are not fundamentally different to the Memorandum, and there are no obvious shifts in argumentation either. The period of narrow Croatian-Serbian language contacts is portrayed as permanent pressure by the Serbian authorities on the serbization of the Croatian language and thus the constant need to defend Croatian linguistic independence. The Novi Sad Agreement about common language (1954) is perceived in the text as a “dictate” (p. 47). Only the Declaration of 1967 is perceived as a turn in a positive direction for the Croats. The conclusion includes a chapter on the standard language and the claim that the relationship between Croatian and Serbian cannot be perceived in the same way as the relationship between different variants of English or German, since Croatian and Serbian were never unified, there was never a common Neo-Shtokavian basis for all South Slavonic languages, nor any initial common standard language on a Neo-Shtokavian basis, which would later develop independently in different territories.

III. Serbia

III.1 Declaration on the Serbian Language (1998)

In June 1996, a new law on the official language was prepared in Serbia, which entered into force in 1997. According to this new law the official language is Serbian, with Ekavian variant of pronunciation and is written in Cyrillic. Accordingly, Ijekavian Serbian lost its official position in the territory of the Republic of Serbia and the so-called Novi Sad era was finally ended. The law was also in contraction to the wording of

the Constitution of the newly constituted Federal Republic of Yugoslavia of April 1992, which only mentions the Serbian language and Ekavian and Ijekavian pronunciations in Article 15 (“U Saveznoj Republici Jugoslaviji u službenoj upotrebi je srpski jezik ekavskog i ijekavskog izgovora i ćirilično pismo, a latiničko pismo je u službenoj upotrebi u skladu sa ustavom i zakonom”).

In August 1998, several Serbian linguists and other similarly-minded persons, grouped together as the so-called World Congress of Serbs, published the “Declaration on the Serbian Language” (*Slovo o srpskom jeziku*) in a Serbian national newspaper “Politika”, and also in the form of a brochure in the same year. The publication represents a wider text advocating the attitudes of a part of the Serbian philological and intellectual community, whose essence lies both in the understanding of the Serbo-Croatian linguistic area as essentially exclusively Serbian, and in the fact that the existence of other nations is not factually recognized in the area of the Shtokavian dialects (Croats and Bosniaks are referred to as “Serbs with Catholic or Muslim religion” (e. g. pp. 7, 10, 11), respectively, the Croatian language is considered to be a Zagreb variant of the Serbian literary language, and according to the Declaration true Croats are merely Chakavian). These attitudes are often sharpened by the views of V. S. Karadžić and other important Slavists of his time, which are now naturally obsolete. The Declaration returns to the widespread conviction among several Slavists in the 19th century (J. Dobrovský, P. J. Šafařík, J. Kopitar, F. Miklosich, V. S. Karadžić), for example, in the opinion that the Shtokavian dialects are Serbian dialects; therefore, today’s Shtokavian based standard language (i. e. the language of the Serbs, Croats, Bosniaks and Montenegrins) is also objectively Serbian, regardless of whether someone likes it or not, since it is *de facto* Karadžić’s Serbian. The Declaration also declares the equivalence of the Ekavian and Ijekavian variants of Serbian as well as Cyrillic and Latin alphabets. The text of the Declaration is critical to glossonym *Serbo-Croatian* (and the other two-component names of common language), which, according to the Declaration, was forced upon Serbs by the Croats in order to gradually “appropriate” this Karadžić standardized modern Serbian literary language by making this composite – and its content – in order to subsequently split the separation of the Croatian language, and create the impression that something was divided that was previously united – according to the Croats against their will. Similarly, the Declaration criticizes attempts made to separate the languages of the Bosniaks and Montenegrins. The document was universally rejected by the profes-

sional Slavist public as being radically nationalistic, and also by Decision No. 2 of the Board for Standardization of the Serbian Language (*U odbranu dostojanstva srpske jezičke nauke*) in the same month that the text was published (Brborić, Vuksanović and Gačević, 2006, pp. 72–76). In response to criticism of this decision published by one of the signatories, M. Kovačević, their position was reiterated by the members of the Board in September 1998 (Decision No. 4 – *Spoj neznanja, izmišljanja i arogancije* – *ibid.*, 79–81). Nevertheless, the argumentative substance of the Declaration is still shared by a relatively large number of Serbian professional and lay public.

III.2 Conclusions of the Novi Sad Scientific Conference “The Serbian Question and Serbian Studies” (2007)

Further proof of this is given by the declarative text of the “Conclusions of the Novi Sad Scientific Conference on the Serbian Question and Serbian Studies” (*Zaključci Novosadskog naučnog skupa “Srpsko pitanje i srbistika”*) of November 2007. The conclusions are divided into six chapters and their opinions are essentially identical to the spirit of the Declaration. The conference was organized by the Movement for the Restoration of Serbian Studies (*Pokret za obnovu srbistike*) with the support of the “Government of the Republic of Serbian Krajina in Exile” (*Vlada Republike Srpske Krajine u progonstvu*). There are 60 names below the Conclusions, but it is not clear whether all of the participants in the conference can be considered to be the intellectual kindred spirit of the Conclusions, although at the beginning of the first section of the Conclusions it is stated quite clearly that: “... the participants of the conference accepted this conclusion” (Milosavljević and Subotić, 2008, p. 139). The text is primarily concerned with the tasks of Serbian studies as a new, post-Serbo-Croatian science. This science should deal with the Serbian area both synchronously and diachronically, in the intentions of the Neo-Vukovite point of view. It is emphasized that the Shtokavian dialects are Serbian, refuting any other names used for the Serbian language, especially the term Serbo-Croatian language. According to the Conclusions, Croats surrendered their language in the 19th century and adopted the “Ijekavian variant of the Serbian language”, which is not unnatural from the point of view of world practice, but it is unnatural and unscientific to rename the adopted language of another nation. Glagolitic and Cyrillic are the origins of Serbian script, which other Slavonic nations also adopted, etc. (*ibid.*, pp. 139–142).

IV. Montenegro

IV.1 Language as a Homeland. A Declaration on the Constitutional Status of the Montenegrin Language (1994)

The preparatory phase of the separation and composition of the Montenegrin standard language took place in the 1990s and is linked to the extensive, often somewhat amateurish, publishing activity of Vojislav Nikčević (1935–2007). In 1994 a group of Montenegrins led by the Montenegrin PEN Center adopted a Declaration on the Constitutional Status of the Montenegrin Language, which title is “Language as a Homeland” (*Jezik kao domovina. Deklaracija Crnogorskog PEN centra o ustavnom položaju crnogorskog jezika*), because the Montenegrins were the only nation on the territory of the former Serbo-Croatian language whose mother tongue bore the name of a foreign nation (see also Neweklowsky, 2010, p. 122). The declarers’ objective was that in the Montenegrin constitution the glossonym *Serbian* be replaced with *Montenegrin*. At that time, in 1995, there was also remarkable international support in the form of the “Resolution of the International PEN Center on the Montenegrin Language” (*Rezolucija Međunarodnoga PEN centra o crnogorskom jeziku*), which was prepared during the 62nd Congress of the International PEN Club held in Perth, Australia³. The final stage of Montenegrin language separation can only be seen under the conditions of an independent Montenegro, i. e. after 2006. That means the constitutional anchoring of the Montenegrin language (first realized in 2007), publication of the Montenegrin orthography (2009) and grammar (2010), and the introduction of the Montenegrin language as the main language as well as the language of primary and secondary schools (as of the 2011/12 school year).

V. Bosnia and Herzegovina

The specificity of Bosnia-Herzegovina standardization discourse can be found in the different views of the naming of the language of Bosniaks: there is competition between the adjective forms of *bosanski* “Bosnian” (derived from the toponym *Bosna* “Bosnia”) and *bošnjački* “Bosniak” (derived from the ethnonym *Bošnjak* “Bosniak”). The Bosniaks⁴ are clear about this – they prefer the first option. Proof of this can

³ See https://hr.wikipedia.org/wiki/Crnogorski_jezik

⁴ In the days of Socialist Yugoslavia, Bosniaks were called Muslims, S-Cr. *Muslimani* (sg. *Musliman*), for which the unusual orthographic designation (with a capital letter M in Serbo-Croatian) is first encountered in the writings of the Yugoslav communists of

be found, among other things, in the names of their basic language and linguistic handbooks, and it is also mentioned in the 2002 Declaration on the Bosnian Language (see below). The Serbs and the Croats (or many of their linguists), on the contrary, tend towards the name *bošnjački*, because from a word formation point of view this adjective clearly refers to the Bosniaks, the only nation of Bosnia and Herzegovina that calls its language so. Their arguments are explained in detail in the First Decision of the Board for Standardization of the Serbian Language of February 1998 (*Bošnjački ili bosanski jezik; sat ili čas; jevrejski, hebrejski (jezik) ili ivrit* – see Brborić, Vuksanović and Gačević, 2006, 61–71). The original idea was that the glossonym *bosanski* would cover the language of all the people of Bosnia and Herzegovina, irrespective of their nationality. The motivation of such a designation was thus a shared space, “bosanski jezik” was to be a continuation of what was called Bosnian-Herzegovinian standard language expression of Serbo-Croatian, respectively Croato-Serbian literary language (“bosanskohercegovački standardni jezični izraz srpskohrvatskog, odnosno hrvatskosrpskog književnog jezika”) in the times of the SFRY and especially after the constitutional changes in 1974, i. e., in fact the Bosnian-Herzegovinian regional variant of Serbo-Croatian (see Greenberg, 2005, pp. 52–54). But this idea was already condemned to failure. At the time of tense nationalism on all sides, it was inconceivable that the Croatian and Serbian inhabitants of Bosnia and Herzegovina would renounce the national naming of their languages, and accepted the “Bosnian language” without justification, which was promoted by the Muslim part of the B&H population (and this attitude still holds true today). In addition, in Muslim views of the Bosnian language, they saw nationalist attempts to impose their own concept of language on the non-Muslim population of B&H. Hence, the name *Bosnian* refers, in essence, only to the standard language of the Bosniaks.

the Second World War, for example in the Resolution founding to AVNOJ of November 1942 and later AVNOJ documents. Their final recognition as the sixth constitutive Yugoslav nation (in addition to the Serbs, Croats, Slovenes, Montenegrins and Macedonians) did not take place until the second half of the 1960s. The attempt to change this ethnonym rarity for a more common expression led political representatives of Bosnian-Herzegovinian Muslims to revitalize the name *Bošnjak* (in English: *Bosniak*), whereas the commonly used *Bosanac* (in English: *Bosnian*) was to remain primarily to describe the inhabitants of Bosnia in the regional sense, regardless of national or religious preferences, but also to fulfill the function of naming the citizen of Bosnia and Herzegovina.

V.1 Declaration on the Bosnian Language (2002)

The “Declaration on the Bosnian language” (*Povelja o bosanskom jeziku*) of March 2002 was an attempt by Bosniak intellectuals to explain and defend the right of the Bosnian language to exist and to the chosen name. The Declaration was made at the Institute of Bosniak Studies at the BCS “Revival” in Sarajevo (*Institut za bošnjačke studije BZK “Preporod”*), and justification was given immediately in the prologue: “Due to the increasingly frequent questioning of the Bosniaks’ right to name their language by its historical name, we, assembling at the Institute of Bosniak Studies in the Executive Committee of the Bosniak Cultural Society “Revival” in Sarajevo, hereby convey to the public that our common position on this issue – which we confirm with our signatures – is expressed in this Declaration on the Bosnian language”. The authors of the Declaration see the Bosnian language as a manifestation of the common language of the Serbs, Croats, Bosniaks and Montenegrins, which is called by its name by each of these peoples. Serbian or Croatian non-recognition of the term *Bosnian* is seen as politically motivated and as a consequence of “surviving but not yet overwhelmed Serbian and Croatian paternalism and the negation of Bosniak national identity”. According to the Declaration, the preference of the term *Bosnian* does not in any way constitute efforts of unification or unitarization in Bosnia and Herzegovina.

V.2 Declaration on the Common Language (2017)

Symbolically, the most recent declaration was made in Bosnia and Herzegovina, which, unlike all previous memoranda, declarations or conclusions, appeals to linguistic unity understood in an antinationalistic way. At the end of March 2017, the text of the “Declaration on the Common Language” (*Deklaracija o zajedničkom jeziku*) was published as a spontaneous conclusion to a series of expert lectures on Languages and Nationalisms (*Jezici i nacionalizmi*), which took place in Serbia, Croatia, Montenegro and Bosnia & Herzegovina during 2016. Inspiration from the book by Croatian linguist Snježana Kordić *Jezik i nacionalizam* (2010) is more than obvious. The basic idea of the Declaration is that the four post-Yugoslav nations previously speaking Serbo-Croatian speak one common language, but with four standard variants that are equal, and that the existence of these variants does not mean that they are four different languages. At the same time, this fact does not question the very existence of four nations or their statehood, religion or other identifying elements, nor does it block the possibility of naming these variants by

various different terms. Each nation has the full right to codify its variant “freely and independently”. The authors of the Declaration then ask, among other things, to stop “unnecessary, absurd and expensive ‘translations’ of judicial and administrative practice” and to remove “all forms of language segregation and language discrimination from educational and public institutions”.

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BOOK REVIEWS

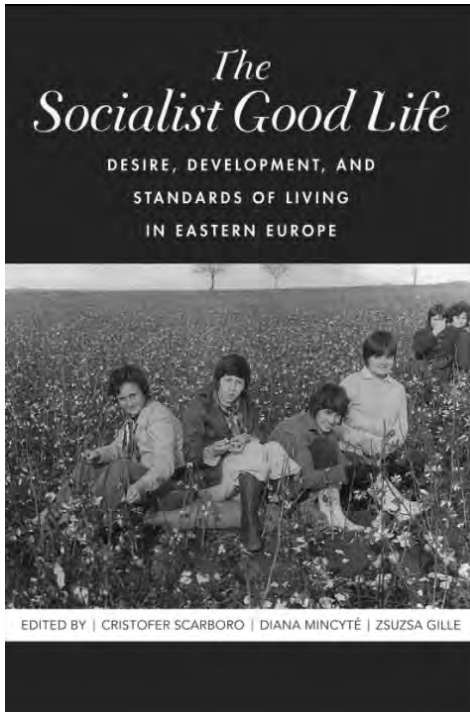
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„The Socialist Good Life. Desire, Development and Standards of Living in Eastern Europe“

Abstract: Review of the book *The Socialist Good Life. Desire, Development, and Standards of Living in Eastern Europe*, edited by Cristofer Scarboro, Diana Mincyté, Zsuzsa Gille, Bloomington, Indiana University Press, 2020, 244 p.

Key words: *EveryDay Life, Standards of Living, Socialism, Development, Eastern Europe*



The Socialist Good Life. Desire, Development, and Standards of Living in Eastern Europe, edited by Cristofer Scarboro, Diana Mincyté, Zsuzsa Gille, Bloomington, Indiana University Press, 2020, 244 p.

The volume, *The Socialist Good Life. Desire, Development, and Standards of Living in Eastern Europe*, brings together the contributions of several authors with consistent publications on everyday life, consumers practices, and political subjectivity during the communist period. Its nine chapters, focused on consumer practices, state policies, and tactics of individuals to overpass restrictions and achieve consumption autonomy, provide an alternative perspec-

tive on communism in Eastern Europe.

The *Introduction* highlights the key points of the editors' views on the topics mentioned above. They underline the success of communist governments in overcoming historical backwardness, raising living standards, improving working conditions and the livelihoods of the citizens of Eastern Europe. Although references are made to all communist countries of the region, the examples refer mainly to Hungary, Poland, Czechoslovakia, and Bulgaria. The former GDR and Yugoslavia are also analyzed, Romania being completely absent as a research topic. Another thesis stated in the *Introduction* induces the idea of similarities between the West and the communist world in terms of consumption. Thus, when it comes to meat consumption per capita, the editors mentioned that “meat consumption in the East and West was comparable between 1950 and 1978.” (p. 2-3) The given examples of Czechoslovakia (with 83.4 kg of meat per capita), and GDR (with 86.2 kg) exceeded the consumption of Austria and Switzerland (in both countries, the meat consumption being only of 83 kilograms). It should be noted, however, that both Czechoslovakia and East Germany had good standards of living even before communism. Consumption comparisons support the idea of the existence of a socialist middle class understood “not in Marxian terms, as defined by its relationship to the means of production, but rather, as it is done in American stratification studies, as a stratum with a comfortable lifestyle, leading a more or less petit bourgeois existence...” (p. 5). Based on these considerations, communism is seen by the editors as a system for which “individual - not only collective - needs were central for the socialist project” (p. 7).

The accelerated and forced modernization brought by the communist regimes in Central and Eastern Europe cannot be questioned. However, the editors' statements need to be nuanced. Overcoming the historical backwardness was one of the aims of the regime, but not the main goal, which was to build the communist society and the “new man” to whom it was given according to his needs, but these needs were established by the state, confiscated by the communist party. Furthermore, although in the economic theories promoted by the communists, man was seen as a rational being, yet the authorities did not trust his reason and decided about his needs. Another clarification that should be made refers to the editors' statement that the communist regimes would have supported and encouraged consumption in search of legitimacy (especially in the '60s and '70s). It is true that no regime can stay in power in the long run without trying to attract its citizens in one way or another. However, in

the case of the communists, the increase in living standards and consumption counted rather for the regime's desire to buy social peace. The well-being offered to the people was a bribe rather than a form of political legitimacy. The collapse of communism highlights the failure of communist social engineering, the dissatisfaction of citizens, including that related to consumer practices and the goods offered to them by the state.

The chapter signed by Mary Neuburger, entitled, *Consuming Dialogues. Pleasure, Restraint, Backwardness, and Civilization in Eastern Europe*, focuses on consumption habits and their evolution as essential vectors of modernity. It underlines the exchanges between the West and the communist world in terms of consumer practices and goods. Analyzing the dialogue between East and West from the perspective of the Bulgarian society, seen as a peripheral one, it looks like the East's criticism of the West played a central role in defining modernity in this country and not only. The communist period, in turn, is analyzed from the perspective of a culture of consumption different from the West, organized and financed by the state, which offered benefits to all. What is not mentioned by the author is the quality of these benefits and the lack of consumption alternatives.

Patrick Hyder Patterson in his chapter entitled, *The Social Contract and Communism's Hard Bargain with the Citizen-Consumer*, states that the communist regimes offered to the people a social contract of a Mephistophelean type, translated by citizens as “to eat what’s good in peace” (p. 55). However, the author introduces some nuances stating that this social contract had always been negotiated due to both the weakness of democratic values among citizens and communist regimes failures in delivering what it was promised (p. 56). It should be noted, however, that this social contract was forcibly imposed in Central and Eastern Europe at the end of World War II by Stalin with the help of the Red Army stationed in the countries of the region.

Brian Porter-Szűcs writes about *Conceptualizing Consumption in the Polish People's Republic* from a different perspective than that of the editors. The American professor does not consider the increase in consumption as a goal in the struggle for legitimacy as he found no evidence for the use of “economic means for political purposes” (p. 82). The chapter highlights the doctrinal economic differences between the communist world and the West in the '50s and '60s, erased in the '70s, which explains, in the author's opinion, the failure of communism. The analysis based on the Polish case shows that communist economists of the '50s

and' 60s, although encouraging consumption, did not support consumer irrationality as in the Keynesian theory promoted in the West. In the 1970s, this approach was abandoned by the authorities for fear of protests. Thus, preoccupation for increasing consumption and gaining consumer goodwill became an important goal for the authorities, even if this approach was criticized by some Polish economists of the period (p. 87).

Unlike Poland, in the GDR, consumption was a priority from the very beginning, as Anne Dietrich points out in her chapter entitled, *Oranges and the New Black. Importing, Provisioning, and Consuming Tropical Fruits and Coffee in the GDR, 1971-89*. Her study emphasizes the importance of consumption in GDR where oranges and coffee had been “the central topic of discussion at party and Politburo meetings” (p. 105). The tactics used by citizens to obtain coffee and tropical fruits, seen as products of a high standard of living, prove that equality was not the one promoted by the system (p. 109). The lack of coffee, tropical fruits and money to buy them from luxury shops plays an important role in changing the attitude of East Germans towards communism (p. 111). It can be inferred that these shortages contributed to the rise of popular discontent in 1988-1989, which eventually led to the fall of communism.

Another chapter, *VCRs, modernity, and Consumer Culture in Late Socialist Poland*, written by Patryk Wasiak, investigates the spread of videotapes in Poland in the 1980s and their role in building social identity. Their influence on consumption patterns in the Poland People's Republic, their role in guaranteeing a certain social status and the attempts made by the authorities to produce local videotapes are discussed in order to highlight the failure of communist technology and consumer policies promoted by the regime.

Consumer practices in post-Soviet Ukraine are analyzed by Tania Bulakh in her study, *The Enchantment of Imaginary Europe. Consumer Practices in Post-Soviet Ukraine*. Based on ethnographic research among the middle-class urban population of Kiev and Odessa, conducted in 2013-2014, the chapter examines 28 interviews with consumers and businessmen, born in the 1980s, belonging to both sexes. The study assesses the identification of consumption with Western welfare and modernity, the lack of mass consumer products from the West being seen as a failure of the transition from communism to capitalism.

Cristofer Scarboro in his study *The Late Socialist Good Life and Its Discontents. Bit, Kultura, and the Social Life of Goods*, investigates consumer practices in Bulgaria from the perspective of the quest of legitimacy by the regime through encouraging consumption. It also emphasize

individuals consumption habits, which focused on acquiring products such as refrigerators, washing machines, televisions, etc. It seems that in the '70s, the purchase of individual goods had become more important than the existence of common social welfare. The author suggests that beyond consumption, gaining satisfaction in communist Bulgaria can be perceived in personal achievements of all kinds, including those by which the restrictions imposed by the system were avoided and overcome.

In their study, *The Prosumerist Resonance Machine. Rethinking Political Subjectivity and Consumer Desire in State Socialism*, Zsuzsa Gille and Diana Mincyté investigate different theories regarding the relationship between consumerism and productivity. The authors point out that the act of consumption is much more complex than previously thought and has a critical, political, ethical side, not just a hedonistic one. They advance the idea that communist societies best managed to link consumption to production, with people being encouraged to create the goods they used, the practice of Doing-it-Yourself (DiY) being promoted by the authorities in the media and through museum practices (p. 224). Due to these practices, but also to the periodic shortages, the goods were not fetishized as in the West, but sacralized “both because of the need to invest labor in them and also because of the social relationships they expressed.” (p. 226) On the other hand, the authors do not support the idea of politicizing consumption, but, by applying William E. Connolly's concept of the “resonance machine”, consider that the ideological goals of the communists have (often) created a positive reaction among the citizens who have supported the consumer practices promoted by the regime.

The nine studies gathered in the reviewed volume offer us a fresh perspective on communism focused on consumer practices, analyzed in various ways, thus highlighting the mechanisms and tools through which communist regimes have attracted their citizens. The application of various theories as regards practices and acts of consumption in the analysis of societies of Eastern Europe offers a different approach to everyday life during communism. What this volume does not offer us (with the exception of the post-Soviet Ukraine) is the consumer experience seen through the eyes of those who lived it. However, this gap cannot be attributed to the authors, but stands as an invitation to future researches.

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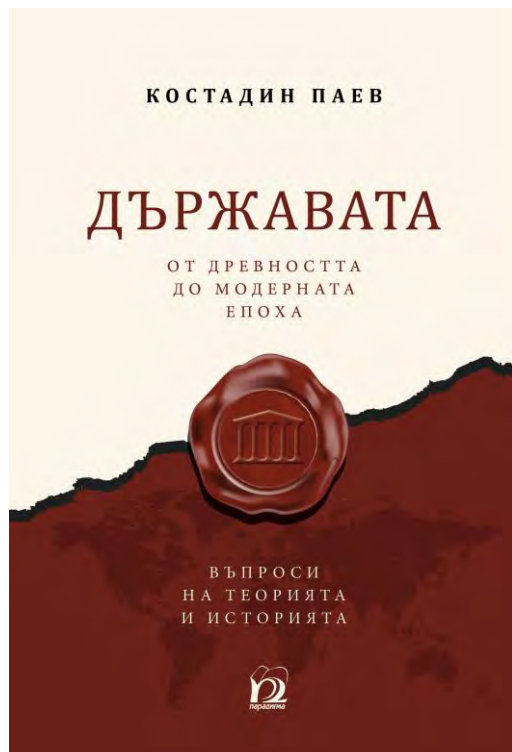
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A Multi-perspective Focus on the State

Abstract: Seeking to present the State from a different perspective, the book examines both classical and modern theories of the emergence of the State, as well as the historical typology and evolution of the State over time. By applying a different approach, it seeks to overcome the confines of single disciplines, such as history, political science, sociology, law and anthropology among others. In practice, the book traces the history of the institution ‘state’ from the Antiquity to the Modern Age.

Key words: state, theory of the state, history of the institution ‘state’, typology of the state, evolution of the state



Paev, K. The State from Antiquity to Modern Age: Theoretical and Historical Questions. Second revised edition: Sofia, Paradigma Publishing House, 2020, 220 p., ISBN 978-954-326-424-7

For generations human society had been engaged in the debate around the essence, origin and role of the State as well as how the institution ‘state’ affects the present nature of society. Naturally, historians, philosophers, sociologists, legal scholars and a wide scope of researchers see the reasons for its emergence in various approaches. Anthropologists, for example, consider the State as a specific social community, political scientists

see it as a form of a political organization, whereas legal scholars look at the State as a form of corporation. In his book “The State from Antiquity to the Modern Age” (Second revised edition: Sofia, Paradigma Publishing House, 2020, 220 p.), Kostadin Paev seeks to answer such central questions by looking at the notion of the State from various perspectives simultaneously.

The book’s main objective is to overcome the unilateral understanding of the State as seen for example in history, political science, sociology, legal sciences or philosophy. Kostadin Paev’s approach uses different methodological means and succeeds to present us with a deeper insight into the matter, which other works do not have come to.

Based on classic theories as well as contemporary authors such as Max Weber, John Galbraith, Robert Dahl, Georges Burdeau, Stephan Breuer among others, Kostadin Paev succeeds to present an actual and complete interpretation of the question of state power and its forms, and by doing that he successfully outlines its characteristics as a main component of the State. By adding historical examples and arguments to various theoretical understandings of the essence of the State, the author reveals its political and economic nature. However, the State as a legal category is considered here relatively modest, as legal scholars have already studied and reflected on the notion of the State extensively.

The book also examines another significant aspect – the relation between State, Religion, and Ideology. Kostadin Paev’s theoretical contributions support the idea of legitimizing the institution ‘state’ through history. The classic theories on the nature of the State are supported by a broad range of historical facts from Antiquity, the Middle Ages and present times. Included in the book are even most recent events, such as the emergence of the Islamic State (DAESH).

Chapter 7 reveals a fresh thesis regarding the genesis of the word ‘state’ in Bulgarian legal publications.¹ Along with the classical theories of the State, Kostadin Paev’s additional theoretical contributions include the idea of legitimizing the State through history, based on cases from Antiquity and the Middle Ages, in which powerful empires have justified their existence by seeking historical continuity from earlier states (pp. 82-83).

Chapter 9 deals with the role and place of territory and population of the State. The relevant topics of particular importance here are related

¹ **Паев, К.** *Произход на думата „държава“ в българската правна лексика.* – *Правна мисъл*, 2016, № 3, 126-137.

to the examination of territories with a specific status – belonging to more than one country or belonging to no country. In addition, a significance is given to the role of the geostrategic position of territory for the development of the State in historical and contemporary terms.

The second part of the book deals with contemporary theories of emerging states from the second half of the 19th and the beginning of the 20th century. A subject in an earlier publication², the author furthers the typology of these theories, and points out to a new, little researched issue – the emergence of the State centred around the creation of an alphabet.

In Chapter 12 “The Nomadic State”, I share the author’s principle view – although nomadic states emerge and exist throughout different historical periods, including after the emergence of territory-settled states, their place is on the brink between pre-state political formations and the actual state.

Further, I fully accept Kostadin Paev’s thesis as stated in Chapter 13 that it is impossible to create a universal typology of the State, as every discipline uses its specific scientific criteria. In practical terms, this “historic typology” appears to be conditional. The author seeks to merge criteria from the sociological periodization (as stated by Max Weber and Stefan Breuer) with those of social anthropologists (Henri M. Claessen and Peter Skalnik). It is worth mentioning at this place that the part concerning the rational state is interpreted in a way, which differs widely from that of above-mentioned researchers. From a historical point of view, the author puts emphasis on the constitutionalism and its main features – civil rights and freedom, as well as principles of division of powers.

In his book, Kostadin Paev pays attention to questions closely related to both the Balkans and Bulgarian history. He focuses on the relationship between ‘nation’ and ‘state’ in the Balkans and Bulgarian history, particularly the so-called “manufactured nations” (pp. 94-95) and the nationalistic ideas emerging from the dispute about the name of the state Macedonia (p. 60). His critical analysis around the question regarding the beginning of Bulgarian sovereignty through the prism of theories of the State ultimately concludes with a reasoned dismissal of ideas referring to

² **Паев, К.** *Модерните теории за възникването на държавата.* – *Studia Iuridico-Historica*, 2017, кн. 6, 90-100.

the foundation of the Bulgarian state at a stage earlier than the conventional and prevalent opinion in historiography. (pp. 130-131). 67).³

The final section of the book summarizes some essential conclusions about the historical development of the State, including difficulties associated with the modern state and its future. In sum, Kostadin Paev's book engages expertly and critically with the notion of the State. Offering a multi-layered perspective of the institution 'state', the book is an innovative and valuable resource for scholars of various disciplines.

³ See an earlier article by the same author: **Паев, К.** *Към въпроса за началото на българската държавност.* – In: Общество, памет, образование. История и обществени нагласи. Т. 3. С.: Исторически факултет на СУ "Св. Климент Охридски". 2017 г., 69-80.

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