

# Balkanistic

**BF**  **Forum '21**  
БАЛКАНИСТИЧЕН  
ФОРУМ **2**



**ESCAPE AND RETURN**

---

**БЯГСТВО И ЗАВРЪЩАНЕ**

# **Balkanistic**

---

**BF**  **Forum '21**  
**БАЛКАНИСТИЧЕН**  
**ФОРУМ 2**

---

ИЗДАВА МЕЖДУНАРОДНИЯТ УНИВЕРСИТЕТСКИ  
СЕМИНАР ЗА БАЛКАНИСТИЧНИ ПРОУЧВАНИЯ И  
СПЕЦИАЛИЗАЦИИ ПРИ ЮГОЗАПАДЕН УНИВЕРСИТЕТ  
“НЕОФИТ РИЛСКИ” – БЛАГОЕВГРАД  
Година XXX

<b>ГЛАВЕН РЕДАКТОР</b> доц. д-р Петър Воденичаров	<b>EDITOR-IN-CHIEF</b> Petar Vodenicharov
<b>РЕДАКЦИОННА КОЛЕГИЯ</b> проф. Михаел Митерауер проф. Карл Казер проф. Мария Тодорова проф. Надя Данова проф. Любинка Търговчевич проф. Елена Сюшор проф. Евелина Келбечева проф. Зейнеп Зафер доц. д-р Елена Тачева доц. д-р Илия Недин доц. д-р Кристина Попова доц. д-р Маринела Младенова проф. д-р Стилян Стоянов д-р Клаудия-Флорентина Добре д-р Милена Ангелова д-р Милен Малаков д-р Нурие Муратова	<b>EDITORIAL BOARD</b> Michael Mitterauer Karl Kaser Maria Todorova Nadia Danova Ljubinka Targovchevich Elena Supur Evelina Kelbecheva Zeynep Zafer Elena Tacheva Iliya Nedin Kristina Popova Marinela Mladenova Stiliyan Stoyanov Claudia-Florentina Dobre Milena Angelova Milen Malakov Nurie Muratova
<b>СЪСТАВИТЕЛИ</b> Кристина Попова Нурие Муратова	<b>EDITORS</b> Kristina Popova Nurie Muratova
<b>ЕЗИКОВА РЕДАКЦИЯ</b> Милен Малаков	<b>LANGUAGE CHECK</b> Milen Malakov
<b>АДРЕС НА РЕДАКЦИЯТА</b> България, 2700 Благоевград Международен университетски семинар за балканистични проучвания и специализации при ЮЗУ “Неофит Рилски”, ул. “Иван Михайлов”, № 66, УК-1, стая 433 Тел./факс (+359 73) 88-55-16 e-mail: bforum1992@gmail.com www.bf.swu.bg	<b>EDITORIAL ADDRESS</b> Bulgaria, 2700 Blagoevgrad International University Seminar for Balkan Studies and Specialization at the South-West University “Neofite Rilski”, Ivan Mihailov str. 66, Room 433 Tel./Fax (+359 73) 88-55-16 e-mail: bforum1992@gmail.com www.bf.swu.bg

**ISSN 1310-3970 (Print)**  
**ISSN 2535-1265 (Online)**

**Indexed in:**

SCOPUS  
Web of Science (ESCI)  
ERIH PLUS  
РИИЦ  
MIAR

<http://www.bf.swu.bg/BF-eng.html>  
<https://www.ceeol.com/search/journal-detail?id=1069>



## **ESCAPE AND RETURN**

**Editors: Kristina Popova and Nurie Muratova**

## **БЯГСТВО И ЗАВРЪЩАНЕ**

**Съставители: Кристина Попова и Нурие Муратова**

*Издаването на този брой на списание "Балканистичен форум" е финансирано от Фонд „Научни изследвания“, Конкурс „Българска научна периодика – 2018 г.“ по договор №КП-06-НП2/13 от 02.12.2020 г.*

**На корицата:** Снимка от книгата на Доган Улуч „Асо купа. Истории в историите“. (Uluç, Doğan. Kupa Ası. Olaylar İçinde Olaylar, İstanbul), 2009, с. 117.

## CONTENTS

### OUR GUEST

#### **Leman Ergenç**

„So Many Languages I Have Studied – Persian, Arabic, Azerbaijani, Turkish and ... at the End Assistant Teacher“..... 11

### ARTICLES

#### **Nurie Muratova**

Baku instead of Ankara – Turkish Students from Bulgaria in Azerbaijan during 1950s..... 22

#### **Begüm Hergüvenç, Mehmet Hacısalihoğlu**

Inclusion and Exclusion: Image and Perceptions of Turkish Migrants in Bulgaria and Turkey..... 38

#### **Luydmila V. Klimovich, Leonid A. Shaipak**

Higher Education Received by Young Russian Emigrants in European Countries in the 1920s-1930s and Problems of further Employment (Based on Materials of Czechoslovakia and France)..... 59

#### **Dmitry Tkachenko, Tatiana Kolosovskaya**

To Reveal the Caucasus Cultures of XIX Century: Orientalism in Russian Caucasus War Period ravelogues..... 74

#### **Zeynep Zafer**

The Turkish Press about the Attitudes of the Bulgarian Turks and the Totalitarian Deportation Policy (1968 - 1969)..... 87

#### **Özlem Hocaoğlu, Apak Kerem Altıntop, Nurcan Özgür Baklacioğlu**

“I will Enter the Suitcase and I will not Make a Sound until we Pass the Border...”..... 113

#### **Andronika Mårtonova**

The Refugees and Contemporary Bulgarian Cinema – Representational Problems and Models..... 138

#### **Valentin Kitanov**

With Chibouk and Hookah: Coveted Escapes in Orient’s Fragrant Space..... 150

<b>Georgeta Nazarska</b> Emigrants, Travelers, and Escapers: the Haidutoff Family between Occident and Orient.....	166
<b>Radostina Neykova</b> The Journey in Animated Cinema - between Escape and Return.....	185
<b>Iris Klosi</b> Social Media Escapism: Exploratory Study of the use of Digital Media by Tirana University Students of English Language.....	196
<b>Maxim Latu</b> Mass Self-Isolation and the Imaginary World of the Future: Visions and Time Spans Reflected in Memes.....	212
<b>Natalija Malets, Oleksandr Malets</b> Dynamics of Cultural and Educational Processes of National Minorities of Transcarpathia of the Second Half of the 20 <sup>th</sup> Century.....	232
<b>Özgenur Çaputlu</b> A Feminist Analysis: Sexual Violence in the Bosnian War (1992-1995).....	254
<b>Kakha Putkaradze</b> Issues of Religious Fundamentalism and Radicalization in Georgia.....	268
<b>Vjollca Dibra Ibrahim, Sejdi Sejdiu</b> Contemporary Albanian Literature in Kosovo (Now and Here).....	292
<b>Lindita Tahiri, Anton Berishaj</b> Religion as Escape and New Shelter: Defamiliarizing History in Popular Fiction.....	307
<b>Sadik Hacı, Zeynep Zafer</b> Modern Bulgarian Literature and the Turkish Loan Words. On <i>Dervish' Karakondzhul</i> (Evil Ghost) of Hasan Efraimov.....	320
<b>Alaal Lateef Alnajm</b> Multiculturalism: Identity, Language and Culture in Zadie Smith's "White Teeth".....	335

<b>Manuchar Loria</b> Regional Studies in Soviet Georgian Ethnography after World War II.....	348
---	-----

## **BOOK REVIEWS**

<b>Milena Angelova</b> Victim of Power, Chosen by Fate – the Memories of Osman Kilic in Bulgarian.....	362
--	-----

<b>Kristina Popova</b> The First Research of the Social History of Tuberculosis in Bulgaria.....	367
--	-----

<b>Kristina Popova</b> A New Contribution to the Establishment of the History of the Health Care as an Independent Scientific Discipline.....	372
---	-----

<b>Ionuț Biliuță</b> The Unwilling Witnesses.....	376
--	-----



## СЪДЪРЖАНИЕ

### НАШ ГОСТ

#### **Леман Ергенч**

„Толкова езици съм учила – персийски, арабски, азербайджански, руски, турски и... накрая възпитателка“..... 11

### СТАТИИ

#### **Нурие Муратова**

Баку вместо Анкара – турските студенти от България в Азербайджан през 1950-те години..... 22

#### **Begüm Hergüvenç, Mehmet Hacısalihoğlu**

Inclusion and Exclusion: Image and Perceptions of Turkish Migrants in Bulgaria and Turkey..... 38

#### **Luydmila V. Klimovich, Leonid A. Shaipak**

Higher Education Received by Young Russian Emigrants in European Countries in the 1920s-1930s and Problems of further Employment (Based on Materials of Czechoslovakia and France)..... 59

#### **Dmitry Tkachenko, Tatiana Kolosovskaya**

To Reveal the Caucasus Cultures of XIX Century: Orientalism in Russian Caucasus War Period Travelogues.....74

#### **Зейнеп Зафер**

Турският печат за нагласите сред турците в България и тоталитарната изселническа политика (1968 – 1969).....87

#### **Özlem Hocaoğlu, Apak Kerem Altıntop, Nurcan Özgür Baklacioğlu**

“I will Enter the Suitcase and I will not Make a Sound until we Pass the Border...” ..... 113

#### **Андроника Мартонова**

Бежанците и съвременното българско кино – проблеми и модели на представянето.....138

#### **Валентин Китанов**

С чибук и наргиле: Жадуваните „бягства“ в ароматното пространство на Ориента..... 150

<b>Жоржета Назърска</b> Емигранти, пътешественици и бегълци: семейство Хайдутови между Запада и Изтока.....	166
<b>Радостина Нейкова</b> Пътуването в анимационното кино – между бягството и завръщането.....	185
<b>Iris Klosi</b> Social Media Escapism: Exploratory Study of the use of Digital Media by Tirana University Students of English Language.....	196
<b>Maxim Latu</b> Mass Self-Isolation and the Imaginary World of the Future: Visions and Time Spans Reflected in Memes.....	212
<b>Natalija Malets, Oleksandr Malets</b> Dynamics of Cultural and Educational Processes of National Minorities of Transcarpathia of the Second Half of the 20 <sup>th</sup> Century.....	232
<b>Özgenur Çaputlu</b> A Feminist Analysis: Sexual Violence in the Bosnian War (1992-1995).....	254
<b>Kakha Putkaradze</b> Issues of Religious Fundamentalism and Radicalization in Georgia.....	268
<b>Vjollca Dibra Ibrahim, Sejdi Sejdiu</b> Contemporary Albanian Literature in Kosovo (Now and Here).....	292
<b>Lindita Tahiri, Anton Berishaj</b> Religion as Escape and New Shelter: Defamiliarizing History in Popular Fiction .....	307
<b>Садък Хаджъ, Зейнеп Зафер</b> Съвременната българска литература и турцизмите. За “Дервишки караконджул” на Хасан Ефраимов.....	320

**Alaal Lateef Alnajm**  
Multiculturalism: Identity, Language and Culture in  
Zadie Smith's *White Teeth*..... 335

**Manuchar Loria**  
Regional Studies in Soviet Georgian Ethnography  
after World War II.....348

## **РЕЦЕНЗИИ**

**Милена Ангелова**  
Жертва на властта, избраник на съдбата –  
спомените на Осман Кълъч на български език..... 362

**Кристина Попова**  
Първо изследване на социалната история на  
туберкулозата в България.....367

**Кристина Попова**  
Нов принос към утвърждаването на историята на  
здравните грижи като самостоятелна научна  
дисциплина..... 372

**Ionuț Biliuță**  
*The Unwilling Witnesses*..... 376

DOI: <https://doi.org/10.37708/bf.swu.v30i2.1>

НАШ ГОСТ

Леман Ергенч

**„Толкова езици съм учила – персийски, арабски,  
азербайджански, руски, турски и...  
накрая възпитателка“**

**Abstract:** *The story of Leman Ergenç, professor of Linguistics about her life in Bulgaria and Tur-key. She was born in 1937 in Harmanli. In 1955 she graduated from Turkish Pedagog-ical School in Sofia and departed for Baku, where she studied Turkish Language and Literature and Psychology as a second subject. When she turned to Bulgaria she worked as assistant – teacher, translator in the Plovdiv library and teacher. In 1967 she emigrated to Turkey – she was invited by her relatives in Edirne to be their guest and decided not to turn back to Bulgaria. At the beginning she worked as high school teacher in the town and then she started her job as teacher of Russian language at Ankara University. Later she founded Bulgarian Philology in Ankara University.*

**Key words:** *Linguistics; Turkish minority; autobiography*



Проф. д-р Леман Ергенч е основателка на специалност „Българска филология“ в Анкарския университет. Родена е през 1937 г. в Харманли. През 1955 г. завършва турско педагогическо училище в София и заминава за Баку, където учи „Турски език и литература“ и втора специалност „Психология“. Когато се завръща в България, работи като възпитателка, преводачка в Пловдивската библиотека и учителка. През 1967 г. отива в Турция на гости по покана на роднини в Одрин и остава там. Най-напред е гимназиална учителка по литература в града, след което започва работа в Анкарския университет като преподавател по руски език, в последствие и по български език.

- Как преминаха ученическите Ви години в България?
  - Учениците в гимназията казаха: „Акцентът ви не е турски.“
- Не ми е турски, защото в България се говорше само на български.

Много рядко на турски, само в семейството. Аз много малко бях при родителите си в Харманли, много малко. Пет години бях в Азербайджан, след това бях в Пловдив, работех, в Димитровград, работех и най-после дойдох в Турция. В България бъркахме турски и български език. Баща ми се ядосваше: „Или на български говорете, или на турски говорете. Това е циганска чорба“. Той беше прав, човекът, имах двама братя и сестри. Ние учехме в българско училище.

Моето семейство се занимаваше със земеделие. Имахме много имот. После по време на социализма преминаха към кооперативи и баща ми каза: „Аз няма да влизам.“ Но тогава аз следвах в Баку и му казаха: „Или влизаш, или дъщеря ти ще върнем в България. И ще ѝ забраним втори път да кандидатства за следване.“ Какво да прави човекът там, възрастният човек... Започнал да работи в кооператива, на своя имот в кооператива. Защо дойде рано на работа? Той е свикнал да отива рано години наред. Изтърпял, не отговарял, нищо не отговарял и когато аз завърших, той веднага напусна. Веднага напусна, нито един ден не остана.

#### **- А как ви избраха да отидете в Азербайджан?**



- Аз завърших в София педагогическа гимназия. Първенец. И влязохме на изпит по българска литература, чужди езици – руски език и английски език. Аз бях най-успешната в руския език, даже попитаха: Вие руския ли сте, аз казах – не! Роднини някакви руснаци? – не. Аз съм туркиня, нямам роднини в Русия. И просто се удивиха. Но аз още в прогимназията си кореспондирах с ученици от руските гимназии. Татяна беше моята приятелка. Това, което исках да кажа на руски, ако не знам думата, ползвах речниците. И какво стана, много ми помогна това за

руския език и като отидох в Москва, аз говорех руски език. И прекрасно говорех.

Първо бяхме в Москва. 500 кандидат-студенти за целия Съветски съюз с влак до Румъния и там сменихме влака до границата с Украйна – там руските влакове широки. В Москва останахме в общежитието на Московския университет около 10 дена. Разпределиха ни по целия Съветски съюз, в Азербайджан изпратиха само турци. В друга република не. Ние сме последния випуск. Отначало са изпращали в различни градове и различни републики, обаче на нашите, особено тези, които са от Родопския край и от Северния край, им било много трудно да разбират руски език и да говорят и отишли при Назъм Хикмет и помолили да им помогне да ги изпратят в Баку. Там имаше от турците и по-рано от нас, те учеха в Педагогическия институт, а ние бяхме в Бакинския държавен университет. Аз учих специалност „Турски език и литература“, но втората ми специалност е психология. Помислих си: Ще се върна в България, в Харманли съм, ще ме назначат в Хасковски окръг (така и стана), къде ще преподавам турски език и турската литература? И реших да взема и втора специалност психология. Разбира се, не беше толкова лесно. Втората ми специалност е учителка по психология. Обаче, въпреки желанието ми да работя по своята втора специалност, в харманлийската гимназия ми казаха: а-а-а, ние вече не учим психология, няма логика, няма психология, има марксизъм и ленинизъм. И аз им казах, че съм завършила марксизъм и ленинизъм с отличие в Баку, ето ми дипломата. Искам да остана в Харманли, вместо да отида в Димитровград или някъде другаде. Казаха: нямаме места, всичко е пълно. Глупости.

**- През 1960 година вече е забранено обучението по турски език, дали затова спират да изпращат турци в Азербайджан? Когато се върнахте в Харманли имаше ли обучение по турски?**

- Не. Отначало, когато започвах да уча в прогимназията, имаше турско училище, когато вече завършвах прогимназията, се отвори турско училище, защото зданието стоеше там от турско време. Брат ми отиде там, майка ми много искаше на турски да учим, викаше, може би някога ще отидем в Турция, да знаят децата да четат и да пишат. И двамата ми братя отидоха в турското училище. Единият що-годе завърши, а другият – нахалост.

**- Казвате, че Назъм Хикмет е издействал турците да ходят да учат в Баку...**

- Тези студенти, с които учехме заедно и бяхме в едно общежитие, ни казаха, че са ходили при него. После ние се запознахме с Назъм Хикмет, много пъти се срещнахме в Бакинския университет. Много пъти сме говорили. Когато той отиваше в Средна Азия, винаги се отбиваше, понеже с параход отиваше там. От Азербайджан има параход до Туркменистан и той спираше и се виждахме. Той изпращаше сведения: „Аз чакам в еди-кой си хотел, в толкова часа ще ви чакам“ и ние, студентите от България, отивахме и се срещаме с него. Много пъти.

**- Дали това е била негова инициатива или са го задължавали?**

- Не, той искаше. Беше много щастлив. Преди да замине в Полша, го питат нашите студенти: „Това произведение кога написахте?“. И той: а-а-а, кога ли го написах, щях да заминавам в Полша и ми трябваха пари. Затова го написах, получих от редакцията пари и сега, казва, отивам.

**- Смятате, че писал за пари?**

- За пари. Иначе предните години той не е писал за пари, ранните произведения.

**- Как се чувстваше със студентите от България?**

- Казваше: „Като се срещам с турските студенти, съм винаги щастлив, защото те са от моето население. Иначе дотук ми дойде от разните шпиони, които са около мене, дори Бабаев.“ Дори Бабаев, който е толкова близко до него, който превежда неговите произведения!

Той викаше: „Навсякъде шпиони, шпиони, дотук ми дойде, затова искам да съм с вас, щастлив съм.“ Това беше 1960-та година. Той имаше една, с която се виждаше, една, с която и ние се срещаме. Те заедно са учили в Московския университет турска филология. Не си спомням името ѝ. Той ни беше запознал с нея и аз често отивах, защото беше близо до нашето общежитие и когато съм сама, отивах. Възрастни хора, общувахме, понякога вечеряхме заедно.

- **Помните ли проф. Ширалиев?**

- Разбира се, помня. Той беше прекрасен човек. Казваше: „Младежи, много ми е лошо, болят ме краката“. Но на азербайджански „крака“ е „къч“. Той предварително ни казва: „Ще ви кажа, но няма да се смеете.“ Защото на турски съвсем друго значение има (задник). Много ни разсмиваше.

- **Вие знаете, че той е бил в България преди това.**

- Да, да.

- **Лекциите ви заедно ли бяха с другите студенти?**

- Лекциите отделно бяха по турски език и турска литература. Само на нас преподаваше. Бяхме 6 човека, ние сме най-малката група. Преди нас, които бяха вече във втори курс, когато отидохме, те бяха повече от 20.



Назъм Хикмет със студентите от България в Баку. Леман Ергенч е втората отляво надясно

- **А другите лекции бяха ли общи?**

- Само азербайджанска литература беше общо, обаче персийски език отделно, арабски език отделно, диамат, исмат отделно. Ние бяхме 6 човека, тишина, професорът преподава и си отива.



Много беше лесно за тях, за преподавателите. Около 35 предмета учехме, като смяташ и езиците. Учихме 5 години.

- **Колко момичета бяхте?**

- От шестимата бяхме 4 момичета. Момичетата бяха от Северна България, Айтен от Хасково, аз от Харманли, една от Шумен, една от Русе. От другите курсове, също филология, имаше доста от Северна България, историци имаше и момичета доста имаше сред тях.

- **Кои специалности бяха препоръчвани за турците от България?**

- В нашия университет „История“ и „Литература“, в Педагогическия не знам.

- **Общувахте ли със студентите от Педагогическия институт в Баку, защото по това време има турски студенти и там?**

- Виждахме се по време на празници, нали по това време имаше народни празници – 9 септември, и други. Тогава се събирахме с тях.

- **Българското консулство общуваше ли с вас?**

- Българският консул веднъж дойде за проверка в университета. В общежитието се събрахме в една по-голяма стая на момчетата, които са по-големи от нашите и там момичетата сготвихме ястия и сладкиши и направихме нещо като банкет за него. Той се зачуди. Понеже българското консулство непрекъснато проверяваше нашия успех и ако се получи слаб 2 и 3 обратно ще ги връщат. Имаше един случай с едно момиче, обаче ние ѝ помогнахме да получи по-висока оценка и никой не се върна обратно. След толкова години да се върнеш е много лошо. Става дума за последните изпити.

През лятото се прибирахме всяко лято в България.

В общежитието бяхме отначало по 3–4 момичета в една стая, после в 4 и 5 курс по две, защото има да се пише дисертация и други работи.

- **Те ли ви хранеха, стипендии?**

- Стипендията за Баку беше 500 рубли, българската стипендия 250 лева. Общо 750.

**- Това беше ли достатъчно?**

- Това беше много добре, достатъчно беше. В общежитието имаше кухня, закусвахме там, обед в университета в стола, а вечеря ние си готвим. Храната си я плащахме със стипендията. Понякога излизахме навън да ядем в *Мороженое и шейк* – нещо като кафе и там има кренвирши и гарнитура с ориз или картофи. Общежитието беше много близо до университета. Беше пълно, само ние бяхме чужди студенти, другите са азербайджанци.

**- Завързахте ли някакви връзки с тях?**

- Да. От нашия университет не остана, обаче от Педагогическия институт едно момиче се ожени за иранец, много красив беше той. Тя беше от Хасково. Той също учеше там. После заминаха за България. Той работи в Софийския университет, персийски преподава. Беше красив. Момчетата се ожениха за студентки от нашето общежитие. Имаше един Ахмед, черноок, с черна коса, красив, завърши история. Едното от нашите момчета беше Хасан.

**- Какво правехте, разкажете за живота извън училището. Какъв беше животът в Азербайджан през 1950-те години?**

- По-свободно беше, опера, театър. Хората бяха свободни, нямаше никакъв натиск, нищо. Много свободни бяха. Баку е богат град, богата страна, навсякъде петрол. Сега положението е друго, преди не беше така. Аз се познавам с Елчибей<sup>1</sup>. Когато учеше в нашия университет, заедно учехме някои предмети. Елчибей да спечели престола в Азербайджан беше много трудно, там има такава група, която нямаше да му позволи и не позволиха. Той се опита, много се труди, обаче за него пътят беше затворен.

Живях в СССР сред народа, повече от месец живях в Москва, после в Ленинград. За лагери нищо не сме знаели.

След като се върнах в България назначението ми беше в Хасковски окръг и в Димитровград възпитателка. Можете ли да си представите – толкова езици съм учила – персийски, арабски, азербайджански, руски, турски и ... накрая възпитателка.

**- Не опитвахте ли да кандидатствате на конкурси в Софийския университет?**

---

<sup>1</sup> Абулфаз Елчибей, президент на Азербайджан от 17 юни 1992 г. до 1 септември 1993 г.

- Колко пъти съм изпращала дипломата си и на всички изпити кандидатствах в Софийския университет за работа. Кандидатствам, питам за резултатите – „А, вашата диплома я няма в университета“. Къде може да бъде? След това ми се обаждат, че моята диплома е в Националната библиотека. „Вземете си дипломата“.

**- Вие по пощата ли изпращахте дипломата си?**

- Не, в университета си я подавах. Подавах я в университета, но има други турци, които са комунисти, аз не съм комунистка. Кого ще назначат, тях ще назначат, няма да назначат мен. И след това се отказах. Работех си като възпитателка две години, после през това време в Димитровград имаше редакция, издаваха вестник. Един ден отидох при главния редактор и казах, че искам да правя преводи, имам много свободно време и мога да превеждам от руски на български език разкази, поезия. Може да ги отпечатате, пари не искам, за мене си. Той каза – може. Започнах да пращам разкази и други от Толстой и други писатели. След това един ден той ми каза, звъни ми, вика: „Аз отивам в Пловдив, ако искаш – той знаеше, че не съм доволна от тая работа – ела с мен да те запозная с директора на Пловдивската национална библиотека“. Отидохме направо при директора на библиотеката. Кой езици знаете, пита той. Започнах да изброявам. „О-о-о, готово, заплатата ще е същата заплатата, защото си учителка, обаче за мен сте нещо много голямо, защото на мен ми липсва и турски език, и руски език ми липсва, вие за мен ще бъдете чудо!“ И действително, правих много преводи, новите книги, които идват по медицина от Русия, даже от английски правих преводи за медицински книги. И той ме назначи в тоя отдел. Най-хубавото време в младите години съм прекарала в пловдивската библиотека. 3–4 години работих там. Хем те използваша моите езици и аз бях много доволна – приятелките ми, всички сме жени, двама мъже имаше и те бяха в печатницата. Събирахме се, ходихме по планините, директорът беше един от организаторите на пловдивската екскурзия и ни водеше в събота и неделя или през празниците и отивахме на Балкана. „Хайде, момичета, отиваме на екскурзия, пригответе нещо хубаво“. И аз приготвих турски сладкиш – кадънгъобеи – за първи път като му сервирахме кадънгъобеи, той каза – това е за мене лукс. И всеки път аз му приготвих кадънгъобеи – женски пъп. Майка ми много хубаво го правеше, аз от нея го научих. Нашият директор направо умираше за тоя сладкиш.

След това аз реших, глупавата Леман, понеже има само 15 дни отпуска, а иначе цял месец, реших да стана учителка. И като казах на директора, че аз ще напусна. „Защо, казва, ще напуснеш, работа не се намира толкова лесно. Доколкото знам, твоите родители не могат да ти помогнат.“ Викам: аз намерих работа, ще стана учителка в Станимака (Асеновград). Българско училище, но има много турци, защото от язовира са дошли в Асеновград, държавата им дала земя и те построили къщи. Четири години бях в Асеновград и всеки ден пътувах от Пловдив с влака. Живеех в Пловдив на квартира. Бяхме две, после другата се ожени и останах сама в квартирата. После дойде племенничката ми и пак станахме две. Тя караше курсове за козметичка. Завърши курса, стана, работи една година, после се върна в Харманли. Работата в Асеновград стана със случайно обявление във вестника. Там преподавах турски език – граматика и литература. Аз преподавах литература, понеже турската литература я знаех много добре. Двама учители преподаваха турски. В селата е имало много турци, обаче там построили язовир и след това ги преселиха в Асеновград, държавата им дала земя, бяха построили къщи по два-три етажа. И станаха граждани и гражданки.

После аз реших да отида в Турция. Там имам роднини – леля на майка ми. Леля ми изпращаше винаги покана, обаче не позволяват комунистите. Не позволиха, тогава отношенията с Турция бяха много лоши. Не може, не може, не позволяват. После леля ми почина, обаче продължи синът ѝ. Тя е казала: „Аз умирам, обаче ти няма да забравиш Леман, ще пишеш и тя ще ти пише, ще изпращаш покана тя да дойде в Турция. Обезателно доведи я в Турция.“ Така казала на сина си и така и стана. Аз дойдох като гостенка. Сама идвам, по покана, на гости. Баща ми каза, направи всичко възможно, останни, не се връщай. Аз навремето не можах да ви заведа, нали 44 година имаше, 51 година имаше. Баща ми много имот имаше и 6 деца, не може да замине. Затова аз не можах да ви заведа, иди ти и не се връщай.

Майка ми не знаеше, никой не знаеше, само баща ми. Ако кажа на майка ми, тя ще отиде при приятелките си, ще бърбори, а-а-а, Леман няма да се върне и после МВР, първа майка ми ще пострада. Веднъж няколко часа са я вкарали вътре. Един турчин с кола отива, майка ми нали е забрадена в черно манто, така ходят турците, видял, че е туркиня и се обърнал към нея и питал за пътя. Майка ми отначало не разбрала на турски, после той повторил – пита за стария мост и майка ми казала, че ще му покаже и жената показала с пръст.

Човекът отива натам, обаче полицията я спира и я питат какво има в джоба, какво ти даде той, измъкни от джоба каквото имаш. Тя вика: нищо не ми даде, пита за пътя. Не, той ти даде нещо, хайде вътре! И я слагат няколко часа, после брат ми разбрал и казал на един роднина комунист, те са братовчеди с майка ми, той позвънил на главния, как може да хвърлите моята братовчедка в затвора, възрастна жена. И така я освободиха. Комунистите вече се чудеха каква мъка да направят на хората. Оставете свободно хората да бъдат щастливи, да работят свободно! Какво стоите като верига на врата им. Ето сега, остана ли на тях комунистите, те си живееха много хубаво, но какво, дойде краят.

В Турция дойдох през 1967 година. Най-после ми разрешиха да дойда на гости. Останах дълго, месец мина. Взех си речниците. Ако ме питат на границата защо нося речниците в Турция, имам доказателство за това. Бях подписала договор с една редакция, те искаха да преведа от Назъм Хикмет и Саббахатин Али някои разкази на български. И аз реших, казах добре и подписахме договор. Обаче после дойде поканата за Турция. Ако попитат на границата – там ще работя през август месец, септември ще се върна, когато се открият училищата. Взех си речниците, защото много ми трябват, а там не мога да намеря – българо-турски, турско-български, руско-турски, английски... всички речници. После всичките ми книги дойдоха в Турция, майка ми ги изпрати с изселниците (1968 г. започна изселването). Един голям куфар пълен с книги.

Останах в Турция чрез фалшив брак с един братовчед. За две години станах гражданка и след това така се разбраха моят братовчед със съдията, че моята женитба е съвсем формална и като стана гражданка ще ни разведат. Съдията е съсед на моя братовчед. И така останах в Турция, българското консулство ме следеше, турците ме следяха дали съм шпионаж, има някаква си от България... дълго време ме следяха, аз не обръщах внимание. Идвали, когато имах квартира, да питат съседите кой влиза и кой излиза. Те казали, никой не влиза и никой не излиза.

Още като не бях гражданка, работех частно като машинописка. Като станах гражданка, дипломата се изпрати в Анкара и веднага станах учителка. В Анкара министърът на просветата е от Одрин и близък приятел на моя братовчед. Веднага показах дипломата и станах учителка в Одрин в гимназията. Но моето желание беше университет, не гимназия. После в университета в Анкара, в руска филология. Те бяха чакали да дойде някой, който знае добре руски.

Изпит имаше – професорът беше от България – Исмаил Кайнак. Той каза, едно място ще се освободи, ти следи и ела в Анкара, една възрастна преподавателка щяла да се пенсионира. И аз трябваше да следя, защото ако изпусна изпита, ще вземат някой друг. Един кандидат имаше и аз – двама, съревнование имаше между двама. Той знае руски, но колкото мен не знае, защото е завършил руска филология в Анкарския университет. Аз съм била в Русия и всички предмети съм ги чела на руски. Затова моят език е много по-напред. Но на изпита имаше и професорки от Средна Азия, много възрастни бяха вече, знаеха руски език. Разговор на руски език и писане композиция, есе на тема. И аз написах. Те казаха, напишете си своята биография на руски език. Аз съм свикнала и за 10 минути съм готова. И спечелих. Дълго време преподавах руска литература. Студентите бяха много щастливи, защото и други преподаватели имаше по руски, обаче нямаха тази практика, която аз имам в страната. Майката на Илбер Ортайлъ беше там, преподаваше граматика.

**- Как основахте специалност *Българската филология в Анкарския университет*?**

- Един ден деканката (Арък – те са от България с мъжа ѝ, историци на изкуството) ми позвъни. Каза: Роди се едно бебе. В началото не разбрах: Какво бебе? – Ами отдел. – Какъв отдел? – Български език и литература, българска филология. Сега имате голяма задача, вие ще създадете, създателка, основателка сте вие. Всичко възможно направете и след два дена искам всичко, което мислите, да го напишете и да бъде на масата ми в деканата.

Направих, имайки предвид и руската филология като модел, имайки предвид и от Баку, знаех отдел как се основава и направих. Програма, език и литература, всичко написано. След два дни тя намери на бюрото си всичко, много се зарадва.

Това е през 1990 година, първите студенти са приети през 1991 година. В началото бяха май 15 студенти. Преподаватели бяхме аз и Хайрие Йенисой. Двете бяхме, после ти дойде [*обръща се към Зейнеп Зафер, която започва работа в катедрата през юли 1992 г.*].

**Въпросите зададох:**

Нурие Муратова и Зейнеп Зафер

21 август 2020 година, Алтънолук (Турция)

*Нурие Муратова*  
*Югозападен университет „Неофит Рилски“, Благоевград*

*Nurie Muratova*  
*South-West University “Neofit Rilski”, Blagoevgrad (Bulgaria)*  
*[nmuratova@yahoo.com]*

## **Баку вместо Анкара – турските студенти от България в Азербайджан през 1950-те години**

**Abstract:** *The paper presents the nonresearched question about the Turks from Bulgaria who studied in Baku in the 1950s. In this period in Bulgaria the Soviet policy for acknowledging of the rights of the national minorities was applied and the communist regime aimed at directing Bulgarian Turks to the Turkic republics of Soviet Union and especially to Azerbaijan. This policy changed at the end of the 1950s.*

*From 1952 to 1960 more than 50 students graduated from Azerbaijan Pedagogical Institute and Azerbaijan State University. They were prepared to teach in the Turkish schools in Bulgaria (around 1100 at the beginning of 1950s) but when they returned there were not anymore Turkish schools in Bulgaria. The processes in the sphere of the national languages and educational policies in USSR for this period have been researched. The alumni from the universities in Baku have to experience the contradictions between the Soviet policies to national republics and dynamic of the policy of the communist regime in Bulgaria concerning the Turkish population. The research is based on documents from the State Archive of Azerbaijan, documents from the Central State Archive in Sofia and oral testimonies.*

**Key words:** *Turkish students; Bak; policy to Turkish minority in Bulgaria; University education*

Целенасоченото изпращане на турски младежи от България за обучение в Баку през 1950-те години е отбелязвано в различни изследвания на турската общност в България, но досега не е било предмет на самостоятелно проучване. Имах възможност да изследвам по-обстойно този въпрос в държавните архиви на Азербайджан<sup>1</sup>

---

<sup>1</sup> Изследването е извършено в рамките на проект „Knowledge Exchange and Academic Cultures in the Humanities: Europe and the Black Sea Region, late 18<sup>th</sup> – 21<sup>st</sup>“

и в архивите и библиотеките на двата университета, в които са се обучавали тези студенти, както и да проведат редица интервюта в Азербайджан, Турция и България.

Студентите турци, които се обучават в Баку през 1950-те години са сред първите турски младежи в България, които получават висше образование, при това в чужбина. Тяхното обучение стартира през 1952 г. едновременно със създаването на специалност „Турска филология“ и откриването на обучение на турски език във физико-математическия и философско-историческия факултети в Софийския държавен университет, в Селскостопанската и Медицинската академия. (Ялъмов. 2002, 313) По същото време започва и изпращане на студенти турци от България в Азербайджанската ССР. До този момент, поради непризнаването на образователната степен от турските частни гимназии, завършилите висше образование от общността са единици. В началото на 1950-те години за турските младежи се откриват възможности да продължават образованието си след гимназията и в средата на десетилетието вече има над 400 младежи с висше образование (Ялъмов. 2002, 316).

От една страна изпращането на близо 50 студенти в Баку е част от политиките на обвързване на Народна република България със Съветския съюз в областта на висшето образование, за да бъдат подготвени идеологически нови кадри във всички области. Споразуменията между двете страни по този въпрос започват още на 15 ноември 1947 г., когато е подписано *Съглашение между съветското и българското правителство за обучение на български граждани във висшите учебни заведения на СССР* (Сборник действующих договоров... 1956, 373-376). То се отнася за обучението на 150 български студенти в СССР, чиято издръжка на 50% се поема от съветска страна. Това споразумение предхожда подписания на 18 март 1948 г. между двете страни по-всеобхватен *Договор за дружба, сътрудничество и взаимопомощ*. (Сборник действующих договоров... 1956, 15). На 25 май 1949 г. е подписан допълнителен *Протокол за сътрудничество в областта на науката, културата и изкуството между България и СССР*, след като българска делегация се запознава с достиженията на Съветския съюз в областта на вис-



шето образование.<sup>2</sup> През 1952 г. съглашението за обучение на български студенти в СССР е актуализирано и частта от издръжката от съветската страна е увеличен на 60%. (Сборник действующих договоров...1957, 262-264). В рамките на тези нормативни договорки попадат и студентите турци, като за тях негласно е определена дестинацията Баку. Не можах да открия изричен документ, който да регламентира това насочване, но е безспорно, че обучението на студентите турци в Азербайджан е част от обвързването на политиката към турците в България със съветската политика през първата половина на 1950-те години. От друга страна то е свързано и с процесите на привличане на турците към комунистическата идея и опитите на режима в България да създаде нова турска интелигенция, която да бъде откъсната от Република Турция и ориентирана към тюркските републики на Съветския съюз и по-конкретно към Азербайджан.

### **Ориентиране на турците в България към Азербайджан**

Въпросът за тюркското малцинство отново придобива острота в самия край на 1940-те и началото на 1950-те години във връзка със започналата Студена война и включването на Турция към противниковия лагер. Още на 9-10 февруари 1945 г., на конференция на партийния актив на тюркското население, проведена от ЦК на БРП (к) се обсъждат въпросите за набавяне на турска литература от Съветския съюз (Ялъмов. 2002, 285). Тогава се задава посоката на бъдещата образователна политика към турците в България, която ще следва съветската политика към тюркските народи и ще използва техните ресурси, за да се откъснат турците от „турска националистическа пропаганда“ (Ялъмов. 2002, 285). Така турците в България са насочени да усвояват азербайджански език за сметка на книжовния тюрски език.

Училищната мрежа от турски частни училища също се реорганизира като от една страна броят им рязко се увеличава с въвеждането на задължителното основно образование, а от друга са превърнати в държавни училища. Духовното училище *Нюваб* в Шумен, до

---

<sup>2</sup> РГАСПИ. Ф. 17. Оп. 3. Д. 1076. Л. 23, Протокол ПБ № 69 от 17 юни 1949 г. п. 90: О приезде в СССР делегации работников Комитета по делам науки, культуры и искусства Болгарии. Дано разрешение на въезд в СССР делегации работников Комитета по делам науки, культуры и искусства Болгарии для ознакомления с достижениями СССР в области высшего образования и искусства, даны поручения ВОКС, Министерству высшего образования СССР, Комитету по делам искусства при СМ СССР по вопросам пребывания делегации в СССР.

този момент изпълнявало ролята на просветен и религиозен център за турците, е превърнато в реална гимназия (Кълъч, О. 2020). Дотогава *Нювваб*, заедно с турското педагогическо училище в Шумен осигуряват основните педагогически кадри за турските училища, а след 1947 г. и педагогическо училище в Стара Загора. Подготовката на педагогически кадри е уредена и чрез постановление, което позволява приемането на турски студенти без изпит в учителските институти в Шумен, Бургас и Пловдив (Ялъмов. 2002, 294).

Подготвят се и партийни функционери сред турците като за целта са организирани партийни школи с преподаване на турски език, през които до средата на 1950-те години преминават над 4000 души. През 1950-51 г. група партийни активисти са изпратени на обучение при Азербайджанската комунистическа партия (Ялъмов. 2002, 321).

Всички тези стъпки са част от цялостната политика към турското малцинство – от една страна държавата се стреми да се освободи максимално от него чрез принудително изселване в Турция (изгонването на голяма част от интелигенцията през 1949 и 1950 г.), а от друга – останалата част да се “превъзпита“ и да се привлече в подкрепа на режима. За тази цел е използван примерът на съветския многонационален модел, който признава и зачита националните особености. Това е характерно за управлението на Вълко Червенков, което се характеризира с налагане на съветския модел във всички области, включително и по отношение на малцинствата. Този модел по-късно е ревизиран от Тодор Живков, който започва политика на заличаване на етническата и културната самостоятелност на турците и на другите малцинства. Живков участва в провеждането на политиката към турците още преди да стане генерален секретар на ЦК. В началото на 1951 г. Политбюро на ЦК на БКП решава да помоли съветското правителство да изпрати още същия месец делегация от Азербайджан, която „да запознае турското население в България с живота на трудещите се в Съветския съюз“<sup>3</sup>. Тогава е възложено на Тодор Живков да събере „отговорни другари турци“ и да организира тази визита, както и да направи концепция за специален отдел в ЦК, който да провежда политиката на партията към малцинствата. В резултат от Азербайджан пристига делегация от 14 души, промишлени работници, селскостопански специалисти и културни дейци и в рамките на един месец от 7 февруари до 8 март 1951 г. посещава

<sup>3</sup> ЦДА, Ф. 1Б, оп. 6, а.е. 1217, л. 1.

повече от 60 населени места в 9 окръга и над 50 училища и 11 културни и научни учреждения (Т. В. Волокитина и др. 2002, 460). Направени са и 80 прожекции на азербайджански филми и киноочерци, излъчени са радиопредавания с азербайджанска музика, както и концерти на живо (Т. В. Волокитина и др. 2002, 461). Навлизането на киното по турските села също е с помощта на азербайджанската кинематография, от която се внасят филми, които турците могат да разбират.

На събранията, които азерската делегация организира при посещенията си по турските села е поставен и въпросът за изпращане на турски младежи от България за обучение в Баку и получаване на помощ от азербайджански педагогически специалисти. Делегацията докладва на заседание на политбюро и на Вълко Червенков желанията на турското население: да получат учебници за турските училища и специалисти от Азербайджан, да се изпращат турски младежи и девойки да се обучават там.

В резултат на това, освен че започва изпращане на студенти в Баку, през 1952 г. и 1953 г. в България пристигат азербайджански педагози, които са назначени за заместник-директори на педагогическите училища и турските гимназии. Издръжката им е поета от съветска страна. От докладна на директора на Азербайджанския педагогически институт „В. И. Ленин“ до зам. министъра на просветата на АзССР става ясно, че само за 1954 г. са изплатени 49134 рубли за педагогическия персонал, който се намира на дългосрочни командировки в България.<sup>4</sup>

Развиват се и научните връзки между двете страни. На 27 ноември 1958 г. в Москва е сключен и договор с БАН за научно сътрудничество взаимни конференции и гостуване на учени с Баку извън договорите между съветската академия на науките. През 1960-те години учените от Азербайджанския държавен университет проф. М. Ш. Ширалиев, доцентите Г. А. Мирзазаде, Г. Г. Мехтиев, А. Р. Агаев, А. Н. Китушин осъществяват обмен на опит<sup>5</sup>, а проф. И. М. Топчибашев през 1970 г. е избран за почетен член на Пловдивското научно хирургическо общество (Рзаев, А. К. 1966, 232). От 1960 до 1975 г. двете страни си разменят по около 150-160 учени и докторанти (Сардаров, З. Г. 1982, 20).

<sup>4</sup> Държавен архив на Азербайджан (ДАА), Ф.1656, Оп. 2, а.е. 41, л. 59.

<sup>5</sup> ДАА, Ф. 1640, Оп. 4, а.е. 771, л. 9.

### Студенти в Баку

Леман Ергенч,<sup>6</sup> завършила Азербайджанския държавен университет през 1960 г. разказва как през 1955 г. заминават за Съветския съюз 500 студенти от България, които в следствие от Москва са разпределени по различни републики. Всички турци сред тях са насочени към Баку. Според нея сред предишните студенти в Баку се е разпространявала версията, че това насочването на турските студенти към Баку е станало по желание на първите студенти от началото 1950-те години и с ходатайството на поета Назъм Хикмет. Той се застъпил за тях, тъй като им било трудно да се справят с руския език. В следствие той често ги посещава, когато е в Баку и поддържа тесни контакти с някои от тях. Известният азербайджански писател Анар Рза потвърждава косвено като описва в спомените си, как от 1957 г. Назъм Хикмет е чест гост в Баку, среща се с поети и писатели, изнася лекции пред огромни аудитории в университетите (Анар. 2013, 483).

Слуховете сред студентите за ролята на Назъм Хикмет в известна степен са достоверни, тъй като той е ангажиран с турците в България още от октомври 1951 г., когато е изпратен да ги убеждава да се включат в колективизацията. Тогава той обикаля турските села и провежда над 30 срещи и митинги, на които присъстват около 130 хил. души. След тази обиколка Хикмет пише доклад, в който препоръчва внасяне на учебни материали от Азербайджан, привличане на азербайджански специалисти в педагогическите училища.<sup>7</sup> На практика неговите препоръки се припокриват с направените по-рано същата година от азербайджанската делегация.

Турските младежи и девойки от България са приети в два университета в Баку – в Азербайджански държавен университет „С. М. Киров“<sup>8</sup> (АГУ) и Азербайджански педагогически институт „В. И. Ленин“<sup>9</sup> (АПИ). Разпределени са в специалностите „Турска филология“, „История“, „Физика“ и „Естествени науки“.

Първата голяма група студенти са насочени към **Азербайджанския педагогически институт „В. И. Ленин“ (АПИ)**, където през 1952 г. са приети 25 студенти от НРБ, включително 5 мо-

<sup>6</sup> Вж предходното интервю в настоящия брой: Леман Ергенч, „Толкова езици съм учила – персийски, арабски, азербайджански, руски, турски и... накрая възпитателка“, с. 11-21.

<sup>7</sup> ЦДА, Ф. 214Б, Оп. 2, а.е. 84, л. 1-7.

<sup>8</sup> Азербайджанский государственный университет им. С. М. Кирова

<sup>9</sup> Азербайджанский педагогический институт им. В. И. Ленина

мичета (Рзаев, А. К. 1966, 22). Може да се каже, че броят на студентите от България не е толкова незначителен на фона на общия прием в тези години – през 1952 г. в АПИ общо са приети 230 студенти, а в АГУ – 642 (Рзаев, А. К. 1966, 140-141).

АПИ е основан през 1921 г., по инициатива на известния комунистически функционер от Баку Нериман Нериманов и стартира с шест студенти и трима преподаватели. В института се преподава на три езика – на азербайджански, руски и арменски.<sup>10</sup> Там завършват образованието си известният азербайджански писател Самет Вургун и редица именити учени. Самият преподавателски състав на института в голямата си част се формира от бивши негови възпитаници.

Студентите от България пристигат на две групи: през март 1952 г. 15 младежи и със закъснение за началото на учебната година, т.е. през ноември 1952 г. още петима. Студентите, дошли със закъснение до началото на следващата учебна година се обучават по 3 часа допълнително в специално обособена подготвителна група.<sup>11</sup> Разпределени са по специалности в различни факултети: в *Историческия факултет* – 6, във *Факултета по език и литература* – 6, трима във *Факултета по естествени науки* и по двама в *Географския* и *Физическия* факултет.

**Сведения за студентите от България в Азербайджанския педагогически институт „В. И. Ленин“ към 15 юни 1954 г.<sup>12</sup>**

Име	Какво е завършил и кога	Кога е пристигнал в АПИ	В кой факултет учи
Расмия Джафарова Алиева	Педагогическо училище в Стара Загора, 30.06.1951 г.	16.11.1952	Факултет по естествени науки (Естфакултет)
Фатма Хусейнова Мустафеева	Педагогическо училище в Стара Загора, 30.06.1951	2 март 1952 г.	Естфакултет
Фарида Тефиковна Юмерова	Девическа земеделска гимназия, с. Пордим, 20.06.50 г.	2 март 1952 г.	Естфакултет
Ахмед Яхов оглу Наимов	Педагогическо училище в Стара Загора, 30.06.1951	2 март 1952 г.	Географски факултет
Ахмед Искен-	Народно-дневна гим-	2 март 1952 г.	Географски факултет

<sup>10</sup> ДАА, Ф.1656, оп. 2, а.е. 17а

<sup>11</sup> Пак там, а.е. 36, л. 64

<sup>12</sup> ДАА, Ф. 1656, Оп. 2, а.е. 36, л. 67.

дерев Сюлейманов	назия Новозагорско, (неидентифицирана – б.а.), 1949 г.		
Джингис Мустафов Хаков	Народно средно училище, село Айтос, 27.09.1951 г.	2 март 1952 г.	Исторически факултет
Сехер Хасанова Фучиджиева	Турско педагогическо училище, гр. Разград 10.07.1952 г.	16.11.1952 г.	Исторически факултет
Хилми Ахмедов Рахимов	Духовно училище <i>Нювваб</i> , юли 1946 г.	2 март 1952 г.	Исторически факултет
Мехмед Раифов Мехмедов	Народна мъжка гимназия Братя Попови (неидентифицирана – б.а.), 5.10.1946 г.	2 март 1952 г.	Исторически факултет
Али Мехмедов Абилов	Народна гимназия, гр. Свищов, 10.06.1944	2 март 1952 г.	Исторически факултет
Исмет Етемов Мехмедов	Турско педагогическо училище, Стара Загора, 1.09.1950 г.	2 март 1952 г.	Исторически факултет
Саяхидин Османов Хасанов	Турско педагогическо училище, Стара Загора, 31.06.1951 г.	2 март 1952 г.	Факултет по език и литература
Рафи Кадиров Мустафов	Народна дневна турска гимназия, <i>Нювваб</i> , 20.06.1950 г.	2 март 1952 г.	Факултет по език и литература
Якуб Мехмедов Исмаилов	Турско педагогическо училище, Стара Загора, 30.06.1951	2 март 1952 г.	Факултет по език и литература
Халил Етемов Раджебов	Народно-дневна държавна гимназия, (неидентифицирана – б.а.), 24.06.1951	2 март 1952 г.	Факултет по език и литература
Сабри Алиев Рамаданов	Турско педагогическо училище, Стара Загора, 30.06.1951	2 март 1952 г.	Факултет по език и литература
Сабиле Юмерова Рамаданова	Турско педагогическо училище, Кърджали, 22.07.1952	16.11.1952	Факултет по език и литература
Хабил Сабриев Ибрахимов	Народна турска гимназия <i>Нювваб</i> , 21.06.1949 г.	2 март 1952 г.	Физмат факултет
Сейфулла Исков Мусов	Народна турска гимназия <i>Нювваб</i> , 20.06.1950 г.	16.11.1952	Физмат факултет

От таблицата се вижда, че 7 са завършили педагогическото училище в Стара Загора, 4 от студентите са възпитаници на *Нювваб*, а останалите са завършили различни гимназии.

Всички студентите са с отличен и много добър успех, с изключение на физико-математическия факултет, където поради слабата им училищна подготовка успехът им е по-нисък. Дори се налага един от студентите от физика да бъде преместен в историческия факултет. Случват се и някои инциденти, като с един от студентите, който пристига с втората група през 1952 г. и се обучава в първи курс в *Факултета по език и литература*, през лятото на 1953 г. заминава в България за ваканция и повече не се връща.

Периодически в средата на всеки семестър се провежда специална беседа с директора на института и някои преподаватели, където се разглежда учебната работа на студентите, открояват се изоставащите студенти, набелязват се начините да им се помогне и т.н. На факултетите и катедрите е дадено указание и са прикрепени към отделните студенти от България преподаватели и аспиранти от института.<sup>13</sup>

Производствената и полевата практика преминават наравно с всички други студенти. Студентите от 1 и 2 курс от *Географския* и *Естествения факултети* преминават полева практика (по зоология, ботаника, основи на селското стопанство и физическа география) на Апшерон. Във 2 курс провеждат и пасивна педагогическа практика в училищата в гр. Баку.

През летните периоди част от студентите заминават на ваканция в България (обикновено повечето от тях). Тези, които остават през лятото в Баку ги настаняват в *Дома за отдих*. Така например, още през лятото на 1952 г. 12 студенти са насочени към *Дома за отдих* в село Билгя, а 4 студенти по препоръка на лекар през 1953 г. са изпратени на санаторно лечение в Крим. За студентите се организират и екскурзии в големите колхози на републиката, за да се запознаят с постиженията в селското стопанство. Има и специално обособен щат за възпитател, чиято заплата се плаща от Министерството на просветата на Азербайджанската ССР, който отговаря само за студентите от България. Така те, освен в общите мероприятия на института, които се провеждат за всички студенти като посещения на театри, музеи, изложби, по специален план са развеждани по заводи, фабрики, запознавани са с известни личности. Също по пред-

<sup>13</sup> ДАА, Ф. 1656, Оп. 2, а.е. 36, л. 65.

варително съставен специален план с тях се провеждат доклади и беседи на теми, свързани с живота на страната, политиката на партията и правителството. Организирано им е и допълнително изучаване на предметите, по които нямат необходимата подготовка – като допълнителни часове по физика и математика със студентите от *Физико-математическия* факултет. Особено се държи на високата им подготовка по руски език и всички го изучават допълнително.

В архивите не се откриват сведения за други студенти, които да са изпратени след 1952 г. в Педагогическия институт в Баку. По-голям е броят на записаните в Азербайджанския държавен университет (АГУ), за който има съхранени документи за три випуска студенти от България, пристигнали от 1953 до 1955 г.

Най-много студенти са записани във **Факултетът по ориенталистика на АГУ**, който в съветското пространство е сред най-известните в областта си. Създаден е през 1919 г. и просъществува до 1930 г. с непосредственото участие на известни учени като Николай Марр, Иван Мещанинов, Василий Бартолд и др.<sup>14</sup> След известно прекъсване, покрай „чистките“ и репресиите през 1930-те години, когато известни учени ориенталисти са обвинени в пантюркизъм (Ашнин Ф. Д., Алпатов В. М., Насилов Д. М. 2002), през 1943/44 г. отново е открито *Източно отделение* във *Филологическия факултет*, което от 1945/46 г. е реорганизирано в самостоятелен *Факултет по ориенталистика* с обучение на азербайджански език. През 1950 г. факултетът вече има следните катедри: Катедра по история на народите от Близкия изток; катедра по персийски език, катедра по турски език, катедра по арабски език и катедра по литература на народите от Близкия изток. Недоверието към турското отделение, обаче, продължава и се дава приоритет на персийските специалности, в които приемът е регулярен. През 1948 г. във факултета се обучават 267 души, от тях 245 в иранското отделение и само 22 студенти в турското. Студентите получават две специалности – *ориенталист* и *преподавател* в средни училища по азербайджански (турски) език и литература.

В катедрата по турски език работят известни тюрколози от съветската школа като Дж. Джабаров, завеждащ катедрата; член кореспондент Н. К. Дмитриев, курсове водят и проф. д-р на фил. науки М. А. Ширалиев – завеждащ на катедрата по езикознание, който води *общо езикознание, диалектология, история на азербайджанс-*

<sup>14</sup> ДАА, Ф. 1640, Оп. 1, а.е. 179, л. 2.



кия език, доц. Мирзазаде Г. – история на азербайджанския език и др. Последните двама през 1953 г. и 1954 г. са изпратени в България, за да подкрепят и организират новосъздадената специалност „Турска филология“ в Софийския държавен университет.

Студентите турци от България са възприети от ръководството на университета като шанс за възстановяване и разширяване на тюркологичното направление във факултета. Връзките с България по посока на турците започват около 5 години след като е възобновена тюркологията в университета и когато вече има ново поколение учени. През 1953 г. във *Факултета по ориенталистика* приемат 9 студенти от България, а на следващата година още 6.<sup>15</sup> Освен тях, още 5 студенти са приети в *Историческия факултет* на АГУ. Точният брой на последващите студенти от България в АГУ трудно може да се установи, тъй като в Държавния архив на Азербайджан се съхранява само обобщена информация за някои от годините и липсват списъци на студентите. От съхранените данни, обаче, става ясно, че през 1956/1957 г. в АГУ се обучават 20 студенти от България в различни специалности, като 7 от тях са жени<sup>16</sup>. На 15.09.1958 г. в *Историческия факултет* има 5 студенти, които са в последен курс на обучение, а във *Факултета по ориенталистика* има 15 студенти в последен и предпоследен курс.<sup>17</sup> През 1959 г. завършват *Турска филология* 9 студенти (3 жени и 6 мъже), а последният випуск от 4 жени и 2 мъже завършва през 1960 г. (виж. *Сн. 1*). Общо само във *Факултета по ориенталистика* към 1961 г. вече са завършили 30 студенти турци от България. Двама от тях остават да се обучават и за докторантура.<sup>18</sup>

В АГУ обучението се извършва на азербайджански и на руски език, като двата сектора са разделени. Студентите от България се обучават в азербайджанския сектор. От дипломата на Леман Ергенч се вижда, че за 5-годишното си обучение в специалност *Турски език и литература* освен общофилологическите дисциплини тя е изучавала шест езика - персийски, арабски, турски, съвременен азербайджански, руски и английски език (*сн. 2*). Въпреки натоварените учебни планове всички студенти от България получават стипендии за отличен успех (12 от тях са пълни отличници) и всички живеят на

<sup>15</sup> Пак там, а.е. 420.

<sup>16</sup> Пак там, а.е. 391, л. 4, 6-12, 65.

<sup>17</sup> Пак там, а.е. 420, л. 72.

<sup>18</sup> ДАА, Ф. 1640, Оп. 4, а.е. 984, л. 17.

общезитие. Отличното им следване е обяснимо, тъй като те са подложени на сериозен подбор още в България. Леман Ергенч от Харманли, която е завършила в българско училище, после е първенец на педагогическа гимназия в София. За да я изпратят в Баку се явява на изпит по български език и по чужди езици – руски и английски.<sup>19</sup>

Тъй като не се откриват данни за изпратени студенти след 1955 г. (последният випуск завършва през 1960 г.) можем да предположим, че то е прекратено с идването на власт на Тодор Живков.

Междувременно в образователния сектор в Азербайджан също протичат процеси, свързани с изучаването на националния език. През 1956 г. е приет Закон за държавния език на Азербайджанската ССР и е обявено връщане към ленинската национална политика и широка употреба на родния език в националните републики.<sup>20</sup> Това от една страна задължава всички институции в Баку да използват азербайджански и от друга радикализира процеса на отделянето му от турския книжовен език. През 1959 г. централното съветско ръководство прави радикални промени и в образователната система на Азербайджан като слива университети. Това засяга и изучаването на чуждите езици и източните езици вече започват да се изучават в Института за чужди езици.<sup>21</sup>

Макар да е прекъснат приемът на студенти от България, без да си дават сметка и за променената политика в България спрямо турците, през 1965 г. от *Факултета по ориенталистика* на АГУ се опитват да възстановят приема на студенти от България и на тази база да възобновят отново специалността *Турска филология*.<sup>22</sup> Ректорът на АГУ проф. Ю. Мамедалиев многократно поставя този въпрос, но получава отказ с аргумент, че подготвените кадри няма къде да намерят реализация. В България още от 1958/59 г. вече са закрити турските училища и страната няма нужда от такива специалисти. По сведения на Леман Ергенч от последния випуск през 1960 г., когато трябва да си заминат за България, са извикани в българското посолство в Баку и им е предложено разпределение по различни села в България като възпитатели.

<sup>19</sup> Виж цит. интервю с Леман Ергенч.

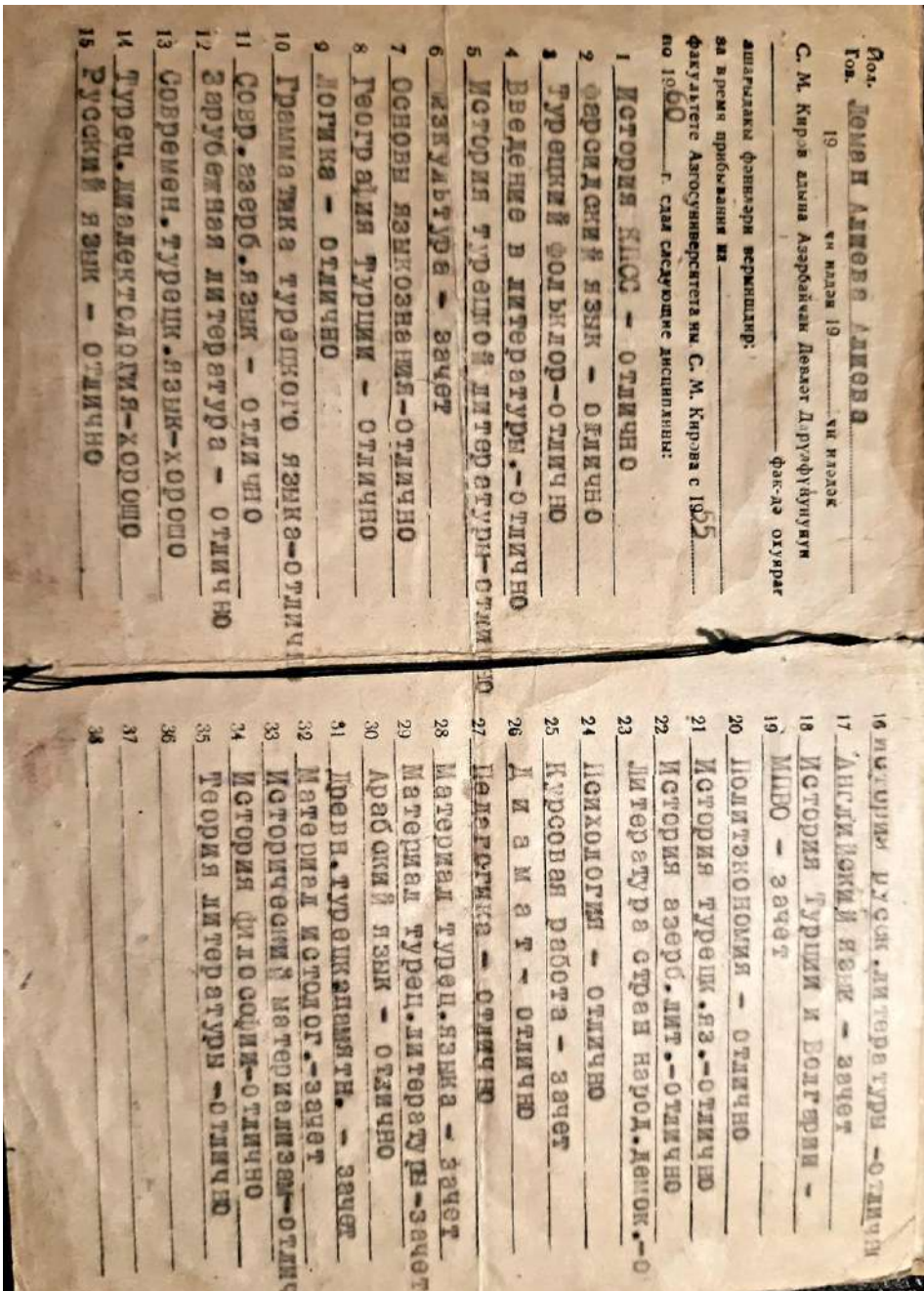
<sup>20</sup> ДАА, Ф. 1656, Оп. 2, а.е. 53, л. 1-2.

<sup>21</sup> Пак там, а.е. 67.

<sup>22</sup> Пак там, а.е. 1178, л. 72.







Сн. 2. Изучавани дисциплини в специалност „Турски език и литература“ на АГУ. Диплом, издаден през 1960 г. Личен архив на Леман Ергенч

Така завършилите в Баку студенти се озовават между съветските политики към националните езици и култури и политическите превратности към турското малцинство в България. Те стават част от краткия няколкогодишен период от началото на 1950-те години, когато има над 1000 турски училища и възможност за формиране на турска интелигенция. Но с квалификацията, която получават в Баку, заедно с колегите си, които завършват специалностите с турски език в Софийския държавен университет, стават излишни още в края на същото десетилетие. Реализацията им става проблематична и в по-вечето случаи те се включват на ниски и средни нива в структурите на ОФ и партийни организации по места, някои стават възпитатели или работят по читалища. Макар и да са възпитаници на известната тюркологична съветска школа и да са обучавани от едни от големите учени в областта, потенциалът на повечето от тях остава нереализиран и пропилян.

По изключение някои то тях се занимават с научна работа, каквито са историците проф. Дженгис Хаков и проф. Ахмет Садулов, философът доц. д-р Халил Е. Раджебов в България и езиковедката Леман Ергенч в Турция. Връзките с азербайджанските учени са поддържани в последствие и от проф. д-р Хайрие Мемова-Сюлейманова Йенисой (лингвист) и проф. Д-р Юзеир Зейналов (биофизик), едни от първите възпитаници на катедрата по турски език на Софийския университет, които по-късно защитават дисертации в Баку.

### **Библиография:**

**Анар. 2013.** Литература, искусство, культура Азербайджана, II том, Баку. [Anar. 2013. Literatura, iskusstvo, kul'tura Azerbaydzhana, II tom].

**Ашнин Ф. Д., Алпатов В. М., Насилов Д. М. 2002.** Репрессированная тюркология. Вост. лит. Москва. [Ashnin F. D., Alpatov V. M., Nasilov D. M. 2002. Repressirovannaya tyurkologiya. Moskva].

**Волокитина Т. В. и др. (ред.). 2002.** Советский фактор в Восточной Европе 1944-1953, Документы, т. 2, Москва. [Volokitina T. V. i dr. (red.). 2002. Sovetskiy faktor v Vostochnoy YEvrope 1944-1953].

**Къльч, Осман. 2020.** Жертва на съдбата, прев. Зейнеп Зафер, Изд. Кралица Маб, София. [Kalach, Osman. 2020. Zhertva na sadbata, prev. Zeynep Zafer, Sofia].

**Рзаев, А. К. 1966.** Очерки истории высшего педагогического образования в Азербайджане, Изд. Маариф, Баку. [Rzayev, A. K. 1966. Ocherki istorii vysshego pedagogicheskogo obrazovaniya v Azerbaydzhanе, Baku].

**Сардаров, Закир Гасан. 1982.** Участие Азербайджанской ССР в экономическом, научном и культурном сотрудничестве Советского союза с НРБ (1960-1975 гг.), Автореферат дисертации, Баку. [Sardarov, Zakir Gasan. 1982. Uchastiye

---

Azerbaydzhanskoj SSR v ekonomicheskom, nauchnom i kul'turnom sotrudnichestve Sovetskogo soyuza s NRB (1960-1975 gg.)].

**Сборник действующих договоров, соглашений и конвенции, заключенных СССР с иностранными государствами. 1956.** Выпуск XIII, Действующие договоры, соглашения и конвенции, вступившие в силу между 1 января 1947 года и 31 декабря 1948 года, Москва. [Sbornik deystvuyushchikh dogovorov, soglashenii i konventsii, zaklyuchennykh SSSR s inostrannymi gosudarstvami. 1956. Vypusk XIII].

**Сборник действующих договоров, соглашений и конвенций, заключенных СССР с иностранными государствами. 1957.** Выпуск XV: Действующие договоры, соглашения и конвенции, вступившие в силу между 1 января 1952 года и 31 декабря 1953 года, Москва. [Sbornik deystvuyushchikh dogovorov, soglasheniy i konventsii, zaklyuchennykh SSSR s inostrannymi gosudarstvami. 1957. Vypusk XV].

**Яльмов, И. 2002.** История на турската общност в България. София. [Yalov, I. 2002. Istoriya na turskata obshchnost v Bulgariya].

*Begüm Hergüvenç, Yıldız Technical University (Turkey)*  
[begumher@gmail.com]

*Mehmet Hacısalihoğlu, Yıldız Technical University (Turkey)*  
[mehmethacisalihoglu@gmail.com]

## **Inclusion and Exclusion: Image and Perceptions of Turkish Migrants in Bulgaria and Turkey**

**Abstract:** *This paper deals with the image and perceptions that Turkish migrants from Bulgaria had about the Turks in Turkey, the Turkish state, Bulgarians, and the Bulgarian state both before and after 1989. Perceptions of the Turkish minority among the Bulgarian communist elite are analysed according to published reports and statements made by Bulgarian Communist Party members. The perceptions that Turkish migrants had about Bulgaria and Turkey are the main focus of this study which is based on field research and interviews conducted with Turkish migrants from Bulgaria now living in Turkey. This article shows that these migrants held both positive and negative perceptions of Bulgaria and Turkey, largely depending on the context. The Turkish minority in Bulgaria was regarded as a problem for the Communist government and as an internal enemy to the Bulgarian state. Moreover, the locals in Turkey regarded the Turkish migrants from Bulgaria as “Bulgarian migrants” who possessed a non-Muslim or “liberal” culture. In this way, they experienced exclusionary attitudes from their neighbours both in Bulgaria and in Turkey. The Turks of Bulgaria perceived the Communist regime as oppressive and as a threat to their Turkish identity. Despite their dislike of the regime, prior to the period of forced assimilation that began in 1984, they still possessed a relatively positive perception about the Bulgarian people. Interestingly, while they perceive Turkey as their homeland, they nonetheless held certain prejudices against the local population in Turkey. All of these various interaction helped to strengthen their group identity as migrants from Bulgaria.*

**Key words:** *Bulgaria; Turkish Minority; Migrants from Bulgaria; Image; Identity; Turks of Bulgaria.*

### **Introduction**

The history of the Balkans is characterized by multiple waves of migration. Thirty two years ago, one of the most dramatic waves of migration in centuries occurred between Bulgaria and Turkey. Since its establishment, Bulgaria regarded its large Muslim minority as an obstacle

that stood in the way of its overall aim to be a homogeneous society and unitary state (Bachvarov, 1997, p. 219; Nitzova, 1997, p. 736). As a result of this attitude, the state implemented numerous oppressive policies against Turkish Muslim minorities which resulted in their migration from Bulgaria to Turkey (Solakoğlu and Hergüvenç, 2021).

The Bulgarian government enacted a wide range of restrictive measures against their Muslim minority in accordance with their own internal political dynamics. These decisions have had a direct impact on issues such as education, belief, clothing, working conditions, and even daily life practices of the Muslim population. The Bulgarian state's most extreme and oppressive policy against its local Turkish Muslim population was the forced migration of 1989. Forced assimilation practices reached their peak with the requirement that Turks changed their names. In addition, there were new punishments for Turks caught speaking Turkish in public. Turks were prevented from meeting their most basic religious obligations, while Turkish music and books were banned. These oppressive measures provoked angry reactions and protests from the Turkish minority which resulted in a deterioration in relations between Bulgaria and Turkey. On May 29<sup>th</sup>, 1989, the Communist President of Bulgaria, Todor Živkov, declared that passports will be given to those who would like to leave Bulgaria, and that permission will be given to those who would like to immigrate to Turkey so long as it opened its borders. With the opening of the Turkey's borders, the Bulgarian authorities also began the deportation of "suspected" Turks within 24 hours. As a result of this migration wave in the summer of 1989, almost 350,000 Turks left for Turkey, while 134,000 of them returned back to Bulgaria during this process (Şimşir, 2012, p. 447).

Some Bulgarian researchers like Darina Vasileva (1992, p. 348) claim that the Turks of Bulgaria migrated to Turkey not only because of political and cultural pressures, but also because they sought of a better life, job prospects, and more money. Explanations like this aimed to downplay the ethnic cleansing that actually occurred in Bulgaria. It was also adopted by researchers critical of Turkish national interpretations of forced migration such as Ayşe Parla (2005, p. 2-3). Other field studies involving these migrants, however, affirm the political and forced migration narrative. One of the most important contributions on this subject came from Nadege Ragaru (2001, p. 297) who pointed out that assimilation policies like this cause serious damage and greatly reduce the possibility of different ethnic groups peacefully coexisting. This damage is found via crude caricatures of the Muslim-Turkish minority that paint



them as backwards and as an extension of “Ottoman oppression.” This particular narrative occupies an important place in the historiography and collective memory of the Bulgarian nation. Bulgaria’s assimilation policies harmed relations among the different ethnic groups in both Bulgaria and Turkey. The main purpose of our work is to focus on perceptions of the Turkish minority in Bulgaria both before and during the period of forced assimilation and exile. We then will examine the perception that the Turks of Bulgaria had about Bulgaria and Bulgarians on one hand, and about Turkey and local Turks on the other.

We used image study methods as a conceptual framework to analyse the image and perception of the Turkish minority living in Bulgaria and Turkey. Imagology, though its multidisciplinary nature, allows us to better analyse discourses from different disciplines. Images are created subjectively. These subjective perceptions are constructed within a common auto-image/hetero-image dyad. As Dominique Schnapper (2005, p. 26) puts it, “the other” for “me” is the missing form of “myself.” Imagology also shows that the use of national stereotypes is associated with group efforts to maintain their collective identity. These stereotypes and clichés allow for them separating themselves from other cultures. For this reason, within imagology, the analyst should try to understand the dynamics between the images that shape “the other” and the images that shape themselves (us) and reveal and question the stereotypes that are transferred (Hacısalihoglu, 2020, p. 35-36; Milas, 2000; Dahl, 2011, p. 27).

From the identity perspective, it is necessary to focus primarily on the establishment of group identity. Vamik Volkan (2007, p. 44, 59) commented that when a community is exposed to discrimination, especially when they belong to a minority ethnic group, they often embrace a common trauma. This trauma also results in the community’s increased investment in their own group identities. The construction of identity often entails a common group response to oppression, especially in communities that collectively share painful experiences such as forced migration and displacement. (Adelaida, 2014, p. 111). As it can be seen in this study, the strong identity perceptions of migrants, especially those migrants that emphasize Turkishness and Islam, are in line with both of the above-mentioned findings. John C. Turner (1987, p. 30) argues that individuals form their group identities by comparing themselves with other groups. This allows the individual to create a romanticized narrative regarding their own group’s historical legacy. Correspondingly, La Barbera (2015) claims that individuals differentiate themselves by adopt-

ing the common characteristics shared by a group and developing a sense of belonging to this identity. Stuart Hall (2003) also emphasized difference and posited that constructed identities gain function through *exclusion* rather than sameness. Likewise, Jan E. Stets and Peter J. Burke (2000, p. 225) point out that similarities between group members are codified via the differences that can be seen individuals who are situated outside the group. Many identity theories accept in-group identity and out-group exclusion as the norm. This state of inclusion and exclusion can be traced both in the establishment of the Bulgarian identity against the Turks of Bulgaria, and in their positioning of the identity of the migrants against the locals. Thus, as Zygmunt Bauman (2018, p. 246-250) pointed out, a narrative emerges in which members of the group see the inside of the group as “protected” and “safe” while that which is outside of it is perceived as “dangerous” and “threatening.” Identities are written on water, not on stone (Reyes, 2014, p. 105). The best example of this is the Turks of Bulgaria who sharply differentiated their identity from Bulgarians in Bulgaria. They imagined themselves as being closer to the Turks living in Turkey. However, at the same time, they created a unique “migrant identity” by dissociating their identity in Turkey for the Turkish born Turks.

In our study, we used discourse analysis as a method to harmonize our aforementioned theoretical framework with the narratives. The main reason for this, as Michel Foucault (1972, p. 12, 254, 255) also claims, is because the discourse focuses primarily on the subject. As for Foucault, discourse is a form of paying attention to the subject that is speaking. The historical nature of discourse does not harmonize subjects who lived in the same time period. On the contrary, discourse analysis argues that subjects can have contradictory choices and reach opposite conclusions. According to Foucault, hearing the voice of the subject requires understanding these contradictions without altogether ignoring historical reality. On the other hand, defining and analysing discourses means identifying the socio-historical structure that makes discourse possible. Louis de Saussure (2011, p. 783, 784), however, claims that the “subject”, in his own words – the “speaker” – speaks precisely in order to convey a message that they want to explain themselves. In this context, “understanding” is at the centre of discourse analysis. Therefore, it is clear that discourse analysis fits the purpose of this study to understand and analyse. Discourse analysis does not only involve examining the use of text and language. It also includes examining the roles of institutions and individuals (Hodges, Kuper and Reeves, 2008, p. 570). According to Van Dijk

(2018, p. 368), the multidisciplinary nature of discourse studies cannot be limited to linguistic approaches alone. As Paul Vogt et al. (2014, p. 44) pointed out, one of the best ways to analyse field studies through discourse analysis.

Based on this conceptual framework, this paper will first deal with the image of the Turkish minority in Bulgaria in the 1980s. The second and larger part, will analyse the perception of Turks who migrated to Turkey, as well as their perceptions about Bulgaria and Turkey, and about Bulgarians and local Turks.

### **Image of Turkish Minority among Communist Leaders in Bulgaria in the 1980s**

There are several different things that shaped the image or perception of Turks in Bulgaria. The first is related to the perception of the Turkish minority that was widely held in amongst the Bulgarian communist elite. They saw them as a “turski vāpros” (Turkish Problem). The solution to the Turkish problem was to forcibly assimilate them. The Politburo under Todor Živkov decided in May 1984 to “unify and incorporate the Bulgarian Turks with the policy of Bulgarian Communist Party.” Only half a year earlier, Todor Živkov himself declared that “Bulgarian Turks” exist as an “ethnic group with their own language, religion, tradition and, to a certain degree, their own non-Bulgarian national consciousness”. Furthermore, he stated that it would be a “mistake” to claim that “they were of Bulgarian origin forcibly Turkified under the Turkish yoke.” According to him, such a policy would provoke “the emergence of nationalism and religious fanaticism among some circles of Bulgarian Turks” (Kamil, 2018, p. 9, 13). The plan therefore sought the “unification of Bulgarian Turks” with the larger Bulgarian nation through some strict measures. The aim of the policy should be – as maintained by Živkov – to educate Turks as “Bulgarian patriots” (Kamil, 2018, p. 13). The Politburo sent instructions and reports to the regional party centres on how to achieve this goal (Kamil, 2018, p. 145). These reports clearly showed how the Communist leaders of Bulgaria perceived their Turkish minority. They declared that they would solve the “Turkish Question” and soon there would no longer be a Turkish Question in Bulgaria. So the first and most sweeping generalization about the Turks in Bulgaria was that: *the Turks were a problem for Bulgaria*.

The next thing that shaped the image of the Turkish minority in Bulgaria was related to names given to the Turks by Bulgarian political elites. Before Bulgarian authorities forced the Turks to change their

name, the general public called the local Turks “bălgarski Turtsi” which means “Bulgarian Turks.” According to Ayşe Kayapınar, the emphasis on “Bulgarian” was a conscious strategy used by the Bulgarian authorities to impose the Bulgarian identity upon Turks (Kayapınar, 2012, p. 100, 101). They were not just *Turks*, rather they were *Bulgarian Turks*. Another phrase used to describe the Turks in Bulgaria was “bălgarski graždani s tursko samosăznanie” or Bulgarian citizens with Turkish self-awareness. This better highlighted the difference between the Turks in Turkey and the Turks in Bulgaria and made the switch from “Bulgarian Turk” to just “Bulgarian” much easier in December 1984.

An even more aggressive assimilative approach was implemented by the Bulgarian government towards the Pomak minority who were called “bălgari mohamedani” (Muslim Bulgarians). “Tyurki” is another word for Turkic peoples. The Turkic tribe “Bulgars,” the founders of the Bulgarian kingdom in the Middle Ages, were called “prabălgari” (Proto-Bulgars). This kind of naming helped de-emphasize the Turkic origin of the founders of the Bulgarian kingdom in the Middle Ages (Kayapınar, 2012, p. 100, 101). All these labels reflected the assimilative intentions of the Bulgarian authorities towards the Turkish minority. However, these were much more inclusive than the labels that came during the forced assimilation process in 1984-1985 where the Turkish identity is completely erased. Even after the communist regime fell and Bulgaria democratized, these labels for Turks continue to exist. (Ersoy-Hacısalıhoğlu, 2020, p. 379) As we state in the next section, this practice has even filtered into Turkey where many people, including Turkish politicians, often use the term “Bulgar Türkü” or “Bulgarian Turk”.

Ayşe Kayapınar claims that appeals to the supposed “Turkish threat” along with the terms used by Bulgarian politicians to describe the Turks living there allowed for them to legitimate their policy of forced assimilation. She calls the production of these perceptions about the Turks “conspiracy theories” crafted by nationalist Bulgarian historians. Among these conspiracy theories, she first mentions the “border question” which is a reference to the idea of a Great Bulgaria as in the times of Tsar Simeon or San Stefano Bulgaria. Turks in Bulgaria are seen as standing in the way of Great Bulgaria. She also mentions the “issue of autochthon people.” According to the official view in Bulgaria, the Bulgarians are the autochthon people, while Turks came later during the Ottoman rule. The trope posits that Bulgarians were victimized and were forcibly Islamised; to be “Turk” means to be the successors of perpetrators. The xenophobic slogan: “if you are a Turk go to Turkey! If you are

Bulgarian, stay!" was used as a political instrument to impose the Bulgarian identity on Turks (Kayapınar, 2012, p. 104, 105).

Kayapınar then goes on to talk about the "manipulation of historical processes" and nationalist tropes regarding a "five centuries-long Turkish yoke" and "forced Islamisation" that were used to create animosity against the Turkish minority. She gives examples from Bulgarian historiography about the Ottoman conquest of Bulgaria and exaggerated representations of the "Batak Massacre" and the history textbooks that depict the Ottoman Turks as "murderers" (Ersoy-Hacısalıhoğlu, 2020; İsoy, 2005). So "if you are Turks, you are successors of the murderers and you are responsible for sufferings of Bulgarian people for five centuries-long," and furthermore, "If you are forced Islamised Bulgarians, so you are also victims of this murderer regime". According to Kayapınar (2012, p. 105-115), these frames were used to justify the violence that was used against the Turkish minority during the period of forced assimilation.

Finally, Kayapınar deals with the perception of Turkey as a "threat" for Bulgaria. Many Bulgarian researchers claim that Turkey follows a policy of "Panturkism." with their overall goal being the occupation of Bulgaria. Therefore it uses the Turkish minority in the region to weaken Bulgaria and cause internal divisions. The Cyprus issue and the Turkish military intervention in 1974 are often pointed out as evidence for the ever-present "Panturkist threat" (Kayapınar, 2012, p. 115-117). At the beginning of the 1980s, Communist Party leaders in Bulgaria led discussions about the "unification" of the Bulgarian Turks with communist aims and the Bulgarian nation. In these discussions, they also talked about the obstacles that stood in the way of unification. A report from June 1984 mentioned that the main threat to Bulgarian national unity came from "bourgeoisie Turkey". According to this report, Turkish policy was anti-Communist, anti-Bulgarian, and reactionary and was supported by the USA and the CIA. They regarded the "Bulgarian Turks" as a fifth column and ally of the anti-Communist West. They aimed to dissuade them from Communist ideas and the Bulgarian folk so that they would oppose the policy of the Bulgarian Communist Party and communist state (Kamil, 2018, p. 143, 144). In this way, the Turkish minority was regarded as a fifth column of Turkey, and therefore were a major internal threat for Bulgaria. This framing helped create the image of the Turkish minority as an *internal enemy* of Bulgaria.

To be more concrete, there were – according to the report by Atanasov – "Turkish nationalists" among the Turkish minority who were

“instruments of the Bulgarian enemies” that served the ends of “Turkish and international imperialism”. Due to this perceived reality, it was seen as necessary to take the strictest legal measures against this particular group of Turks.

Socio-economic and territorial isolation as well as “isolation in labour collectives” which was called a “peculiar Gordian knot” were also issues that were seen as obstacles that hindered Bulgarian national unity. Atanasov argued that this knot had to be untied first. If this knot could be untied, then “change to the self-consciousness of the Bulgarian Turks, their culture and their lifestyle” could more readily happen (Kamil, 2018, p. 146-147). Here one can see that the image portrayed of the Turkish minority was one of a *socially and territorially isolated minority*, or in other words, as a “peculiar Gordian knot”.

Finally, Bulgarian historians liked to argue that the Islamic religion was another key reason why the Turkish minority was difficult to assimilate. According to the report, “Islamic religious fanaticism” was the basic factor for social and traditional conservatism. At the same time, it also facilitated in the “emergence and development of Turkish bourgeoisie nationalism.” The mosques were portrayed as “ideological and political institutions against us [Bulgarians]”. The so-called Bulgarian Turks celebrated Muslim holydays “*en masse*” and these celebrations often were seen as mobilizing nationalist elements. During the *Bayram* holidays for example, the mosques were full. These people then could more readily organize *en masse mevlids* (religious celebrations) for different occasions. They could then also circumcise children *en masse*. They used *şalvari* and other traditional clothes. There was evidence of religious revivalism and “conservatism in tradition, dress, habits, etc.” The description helped solidify stereotype for Turkish minorities living in Bulgaria as “*fanatic Muslims*”, “*conservative*”, “*Turkish nationalists*”, and “*traditional*.” Therefore the mosques were seen as an “*enemy of Bulgaria*”.

The same report also argued that the widespread use of the Turkish language was another obstacle for national unity: “Speaking the Turkish language is going on in the public and workplaces, ‘even in the schools’. They sing Turkish songs and practice Turkish dances ‘even in public places’. They listen to radio channels from Turkey or other neighbouring countries.” The above quote from the report shows how the Turkish language, Turkish songs, and Turkish dances were seen as a *threat to Bulgaria*. This threat was further strengthened by argument that the Turkish minority in Bulgaria had higher birth-rates than did the ethnic Bulgarians.

As early as May 1984 Živkov commented that almost one million Turks who are seen by Turkey and the CIA as a “reserve for anti-Bulgarian manifestations” was an enormous number to deal with (Kamil, 2018, p. 12). A further stereotype about the Turkish minority was related to the “izselničeski vāpros” (Migration issue). As stated by Živkov and Communist leaders, the migration of Turks from Bulgaria was not “through our fault”, rather it was the “fault of the Turkish side.” The stereotype in this regard was that the *Turks provoked their migration from Bulgaria*.

Let us list here the numerous stereotypes and negative language used regarding Bulgaria’s Turkish minority that could be found in the various declarations of the Communist leaders during the 1980s: *Bulgarian Turks, problem for Bulgaria, question to be solved, forcibly Islamised Bulgarians, forcibly Turkified Bulgarians, successors of murderers or Turkish yoke, fifth column of Turkey and the CIA, internal enemy, Turkish nationalist, instruments of Bulgarian enemies, territorially and socially isolated minority, Gordian knot, fanatic Muslims, traditional and conservative people, the enemy of Bulgaria, threat for Bulgaria, reserve for anti-Bulgarian manifestations, fault for their migration*, etc. All these negative stereotypes helped codify the image of the Turkish minority as an *internal enemy and threat* for Bulgaria. Due to this reality, it was the duty of the Bulgarian Communist Party to *solve this problem once and for all*. All these conspiracy theories, as Kayapınar notes, culminated with in the name change policies and forced assimilation process that begin in December 1984 (Ersoy-Hacısalihoglu, 2012, p. 181).

The forced assimilation process was called a “rebirth process” (vāzroditelen process) by the Communists, and was based on the historical rhetoric surrounding “forced Islamised Bulgarians.” This so-called rebirth process in actuality resulted in efforts to eliminate all forms of Islamic and Turkish cultural expression in Bulgaria. It was such an egregious policy and violation of basic human rights that in 2012 the Bulgarian Parliament formally condemned these actions, going as far as to claiming that the Bulgarian Communist Party had engaged in an indefensible and immoral policy of ethnic cleansing (Kamusella, 2019).

### **Perceptions of the Turkish Migrants about Bulgaria, Bulgarians, Turkey and Turks in Turkey**

In this section, we will analyse the perceptions that the Turkish migrants had about Bulgaria and Bulgarians on one hand, and Turkey and the Turks living in Turkey on the other. Begüm Hergüvenç (2020) con-

ducted field research with Turkish migrants from Bulgaria which are partly evaluated in a recently published article titled “The Migrants of 1989 from Bulgaria and Their Adaptation to City as Identity Construction: Sakarya Case”<sup>1</sup> The analysis of the interviews with Turkish migrants living mainly in the city of Sakarya and its surrounding areas allow for us to define the four factors that will be discussed below. In this way we can also come to better understand their own perceptions about their own identity.

First, we notice that the migrants clearly demarcate between the period before 1984 and after 1984 when considering their perceptions of Bulgaria. Generally, they had a positive image of Bulgaria prior to 1984, mainly in the context of their social and economic life. Most of the migrants describe the period before 1984 as a period of “prosperity” (Fevzi Mehmed, 2015, p. 84) and express their overall satisfaction with living in Bulgaria (Durmaz, 2019, p. 161). Within Turkish academic literature, Bulgaria, regardless of who was in power, has generally been portrayed as having a single political vision regarding its Turkish minority: namely one of assimilation or expulsion (Solakoğlu and Hergüvenç, 2021). We notice that the perception of Bulgaria held by the migrants differed in some respects from what academics in Turkey have been saying about it.

The positive perception about Bulgaria held by migrants were primarily related to the country’s education/health services and the vitality of business and social life. In her Master’s Thesis, Gülcan Er Savaş (2011, p. 161), showed that Turkish migrants from Bulgaria had a positive views on how education, women’s rights, honesty in social life, working conditions, and health services were handled in Bulgaria. The Bulgarian education system before 1984 for example has been widely praised by migrants in numerous earlier survey studies. The following pages will show that views on education constitute the fundamental difference between the Turkish migrants from Bulgaria and the Turks of Turkey.

On the one hand, the migrants emphasized how they face discrimination from the Bulgarian government regarding their choice of profession, and that they were seen as second class citizens (Kurtuluş, 2019, p. 85; Özkan, 2010, p. 159; Er Savaş, 2011, p.133). On the other hand however, they also stated that the Bulgarian administration created some positive opportunities for them to make their careers, and that the Bulgar-

---

<sup>1</sup> (This field study was conducted with 5 female and 5 male migrants in Sakarya using the interview method.)



ian government were successful at providing paid maternity leave and day-care for women with young children (Çiğerci Ulukan, 2008, p. 183). In this context, women's basic rights, working conditions, and social life in Bulgaria were seen as better there than in Turkey (Hocaoğlu, 2011, p. 208). Migrants also had positive views regarding how the Bulgarian government handled urbanization and landscaping. Obviously, the positive perceptions of the migrants about Bulgaria are rooted in some concrete realities. However, “nostalgia for the good-old days” may have facilitated in some of the overly positive perceptions of pre-1984 Bulgaria. Needless to say, this kind of nostalgia for the benefits of old Communist times can be found almost in all post-Communist countries. Therefore, this perception is similar to that of other former Communist Eastern European countries.

There are also some very negative perceptions about Communist Bulgaria – pre- or post-1984. One widely held perception was that the Bulgarian government caused pain and cruelty to ethnic Turks living there. Many migrants highlighted how the then-Bulgarian government was responsible for many injustices against the Turks (Özlem, 2020, p. 130; Yiğit, 2012, p. 171). There also were many migrants who harboured deep animosity towards Communism and the Communist Party (Fevzi Mehmed, 2015, p. 198). Many of the Turkish migrants felt that the real goal of Communist Bulgaria was to commit genocide against the Turkish minority (Şerefli, 1990; Bojkov, 2004, p. 343-369; Hacısalihioğlu, 2012, p. 56-57; Vasilev, 2002, p. 105). In her study on novels written primarily by migrant authors of 1989, Gözde Özlem (2020, p. 124-130) states that “the ultimate other” of the Turks appeared to be as the Communist Bulgarian regime. There also were some migrants who held the Soviet Union responsible for Bulgaria’s assimilation policies and saw Bulgaria merely as a satellite of the Soviet regime doing what the Kremlin told them to do (Fevzi Mehmed, 2015, p. 73; Hacıoğlu, 2012, p. 542, Kurtuluş, 2019, p.126).

Migrant perceptions of the Communist regime overall seems rather ambivalent. There are two reasons for this assertion. First it is important to remember that by 1984, Bulgaria already had a Communist regime ruling over the country for almost 40 years. Two great immigration waves grew up and lived under the Communist regime. How realistic can the peaceful perception of the migrants about Bulgaria until 1984 actually be? Many were born into this system and knew nothing else. The second thing worth mentioning is that both the positive image that migrants had about Bulgaria as well as their negative perceptions emerged due to

how the Communist regime behaved. The attitude of the migrants towards Bulgaria changed after the fall of Communism. Therefore, it seems that the migrants have a love/hate relationship with the old regime. Increasing unemployment, the disappearance of state security, and the decrease in salaries have reinforced the perception that Bulgaria is an impoverished and collapsed country and that things were better in the past (Ciğerci Ulukan, 2008, p. 223; Şencan, 2013, p. 162). In fact, Mehmet Türker, who himself was a 1989 migrant, wrote a series of articles titled “The devastated country Bulgaria” after he visited Bulgaria in 1991 noting its rapid decline (Türker, 2010, p. 235). Despite all the pains the old Communist regime inflicted, for many migrants, Bulgaria still is perceived to be their home (Hergüvenç, 2020, p. 40)

At this point, a distinction must be made between Bulgaria the country and the Bulgarian people. The Bulgarian people did not have the same animosity towards the Turkish minority as did the Communist government. The migrants assert that they generally had good relations with the ethnic Bulgarians and were friends and neighbours with many of them (Fevzi Mehmed, 2015, p.189; Güler, 2014, p. 89; Kurtuluş, 2019, p. 79; Şencan, 2013, p. 57; Yiğit, 2012, p. 171) There are even migrants who expressed their discomfort when hearing stereotypes that described the Bulgarian people as bad or cruel. Nazlı Şencan (2013, p. 57) emphasizes that the Bulgarian neighbours who acted respectfully and sincerely are still remembered with affection by the Turkish migrants. There were even some Bulgarians who spoke Turkish, participated in Muslim holidays, and some Bulgarian doctors even secretly circumcised the children of Turks (Borlat, 2019, p. 105). It is important to point out that this is not a universal sentiment held by all Turkish migrants. In “Letters from the House of Pain”, Ömer Osman Erendoruk (2007, p. VII) – one of the 1989 migrants – narrated in his memoirs about Belene that he still sees Bulgarians as the enemy of Muslims. Undoubtedly, his suffering at Belene played an important role in this negative perception.

Relations between ethnic Turks and ethnic Bulgarians in Bulgaria also changed as a result of the state’s assimilation policies. Some Bulgarians supported the assimilation policy while others opposed it. Coşkun Borlat’s study noted that after the Turkish names had been changed, some Bulgarians asked for them to be given Bulgarian names meant to annoy or humiliate the Turks, and that Turks could not even buy medicine at the pharmacy anymore because of their ethnicity. During these turbulent times, ethnic Bulgarians also made harmful jokes about the Turks (Borlat, 2019, p. 88). The migrants also pointed out that Turks

living in Bulgaria were insulted with abusive labels such as “dirty Turks, lazy Turks, and stubborn Turks” (Fevzi Mehmed, 2015, p. 81; Yorulmaz, 2012, p.55). Turhan Çetin claimed that almost half of the migrants he interviewed in his study reported that they experienced discrimination from the Bulgarians (Çetin, 2008, p. 66). During the forced migration, especially in the areas that were on the migration route, positive perceptions of the Bulgarians shifted to negative ones. The migrants reported that they received ignominious reactions from the Bulgarians. They held especially negative views of the Bulgarian Policeman. Many migrant narratives reported that the Bulgarian police treated them inhumanly, especially near border areas (Borlat, 2019, p. 88).

When looking closer at migrant perceptions of Turkey, it is clear that most Turkish migrants accepted that Turkey was their homeland even while they were living in Bulgaria. They always longed to return to Turkey. The historical narrative about how their ancestors from Anatolia migrated to the Balkans solidified the perception that Turkey was their homeland. Almost all migrants have expressed no regrets regarding their decision to come to Turkey. Security and safety were amongst the migrant’s chief concerns. In this context, migrants reported feeling safe and able to freely express themselves in Turkey (Çiğerci Ulukan, 2008, p. 221; Er Savaş, 2011, p.161). The freedom to express their identity appears as the most important thing for most of the migrants. Migrants also perceived Turkey as a “great state” (Borlat, 2019, p. 103; Şencan, 2013, p. 98). In addition, many migrants pointed out that Turkey’s economic situation and overall working conditions were much better in Turkey in comparison to post-Communist Bulgaria (Hocaoğlu, 2011, p. 208; Çiğerci Ulukan, 2008, p. 224).

Although most migrants saw Turkey as their rightful home, most nonetheless had both positive and negative perceptions about Turkey. Their biggest critiques of Turkey were related to its inadequate education system and its lack of proper protections for women’s rights. One migrant interviewed by Hergüvenç stated that the education system in Bulgaria was there better than the education system in Turkey. According to him, the Turkish education system was less developed.<sup>2</sup>

Migrants were also critical of the rigidity of superior-subordinate business relationships in Turkey. This hierarchical pattern was reflected both in subordinate-superior communications and salary imbalances (Durmaz, 2019, p. 180-181). Most of the migrants saw Turkey’s outreach

---

<sup>2</sup> Interview with İ..., (65, male, Visa-free, Kırcaali), 06.11.2019, Sakarya

to them during their first years as decidedly insufficient. Didem Danış and Ayşe Parla's (2009, p. 149) work on Balkan Turks Solidarity and Culture Association representatives illustrated that migrants do not receive enough state support, that promises such as migrant housing have not been fulfilled, and that no real preparations were made for integrating the new migrants. The absence of proper psychological counselling and social workers to help with the migrants' transition process also exposed some of the Turkish state's weaknesses when it came to integrating their new citizens. Finally, many migrants criticized Turkey's corrupt political culture, as well as the prevalence of bribery and nepotism in its political system (Er Savaş, 2011, p. 147; Durmaz, 2019, p. 139; Şen, 2004, p. 55). They felt that the reason for this was due to poorly educated and unprofessional political actors (Öztürk, 2012, p. 261). Despite all these problems however, in the end, Turkey is where most migrants felt that they would be able to freely live as Turks and Muslims. As one interviewer put it: *"I am Turkish. I've come to Turkey. I love Turkey, I want Turkey to become very modern and very beautiful, no matter how much evil there will be against us. We deserve it."*<sup>3</sup>

Finally, it is necessary to touch upon the migrants' perceptions of the Turks already living in Turkey. One of the migrants interviewed by Hergüvenç noted how that in Turkey there were different traditions and life styles in each region.<sup>4</sup> Another interviewee, drawing attention to ethnic mosaic in Turkey, said the following: "One of the neighbours says 'I'm Albanian' and another one says 'I'm Bosnian.' I said, 'maybe we have come to the wrong place. Is this place not Turkey?'"<sup>5</sup> This perception of the locals in Turkey regarding their ethnic diversity is similar in many different cities in Turkey. A lot of research has been done on migrants' perceptions about the local Turkish people. This is quite natural, because, on the one hand, many of the migrants see themselves as "the main owner of the country" since they endured many difficulties in order to return to their homeland. On the other hand, there are Turkish people that are already living in many of the places the migrants ended up migrating to. Forced migration can be frightening for both parties. Locals have been in a hurry to divide the already scarce resources with migrants, and they themselves have faced an unfamiliar new culture. Many migrants literally gave up everything in order to freely express themselves

<sup>3</sup> Interview with O..., (65, male, with Visa, from Osmanpazarı), 23.10.2019, Sakarya.

<sup>4</sup> Interview with E..., (59, male, Visa-free, Zagoğçe), 23.10.2019, Sakarya.

<sup>5</sup> Interview with K..., (60-65, female, Visa-free, Kircaali), 7.11.2019, Sakarya.

and have learned that the language-religion-race partnership cannot overcome all other differences. In fact, according to migrants, most of the locals could never make the same sacrifices that they made. At the same time, many locals did not appreciate the migrants and found many of the migrants to be unreliable. That is why many interactions between migrants and locals have, at times, been complicated and challenging.

In order to better understand migrant perceptions of the local people, it is necessary to first look at how they define themselves. In many studies, migrants described themselves as honest, reliable, hardworking, clean, tolerant, respectful, and steadfast. Many stated that their culture was similar to that of other Europeans. The migrants saw themselves as quite different than the local Turks. Although most migrants initially reported positive relations with the local population, it is clear that they still harboured some prejudices against the locals. Migrants described the locals with adjectives such as 'stingy', 'hypocritical', 'lazy', 'dirty', 'ignorant', 'prejudiced', 'uneducated', 'uncultured', 'conservative', 'money-grubber', 'unreliable', and 'patriarchal'. In Er Savas' study (2011, p. 150), 65% of the migrants reported that they were ethnically different than the locals.

One major point of contention for the migrants was the position of women in Turkey. The migrants were puzzled by the limited opportunities that women had in business and in society more generally. Migrants were most critical of the low professional and social positions that women in Turkey found themselves in. Working migrant women always has been a source of tension between the migrants and the locals. Migrants reported feeling that the majority of local people were unaccepting of working women. Zehra Kederli Yapıcı (2008, p. 390-395), states that migrant women have much problematic for the local identity than migrant men because they have been more affected by the lifestyle in Turkey. Local women generally do not want to work and sacrifice their comforts, yet they are still envious of the working migrant women. Migrant women were seen as freer, more qualified, and stronger than local women, and local women are cynical of them while they continued to live their lives in the shadows while keeping many secrets from their husbands. Migrant men have been very supportive of the other migrant women. Migrant men are less complicated, more open-minded, more understanding, and do not feel threatened when women are equal to them. Local men on the other hand have a much harder time accepted women as their equals due to the pride they take in their masculinity and traditional patriarchal social norms.

Education is another thing that differentiates the migrants from the local native-born population. Migrants often compared education in Bulgaria with Turkey, pointing out that the quality Bulgaria offered is a higher quality education and that they are more educated than the locals. The emphasis that migrants placed on Bulgarian education was frequently encountered. The quality of education is mostly attributed to the Communist system. As noted above, education was seen as one of the few bright spots within the Communist system. The migrants claimed that the Bulgarian education system has taught honesty, integrity and diligence (Hergüvenç, 2020). On the other hand, according to the migrants, the locals do not even have an adequate knowledge of their own history. The migrants have also been shaken by the fact that the locals have often described them as “infidel”, “Bulgarian migrants”, and “Bulgarians.” They had a hard time accepting that the locals had such limited knowledge about the Turks of Bulgaria. This is one of the key reasons why the migrants regularly claim that the locals are ignorant. The migrants viewed cultural literacy as being directly connected with education; the migrants claimed that people in Bulgaria regularly read classical works and went to the theatre. In contrast, they claimed those living in Turkey did not regularly participate in cultural activities (Durmaz, 2019, p. 163). Consequently, they described themselves as much more “cultured” than the locals.

Magdalena Elchinova (2005, p. 20) highlighted how that Turks of Bulgaria were seen as too conservative in Bulgaria, and too liberal in Turkey. Elchinova’s claims on this matter are similar to Kederli Yapıcı (2008, p. 392) who also argued that most migrants felt that the Bulgarians were oppressive because they (the Turks in Bulgaria) were conservative, but now the locals in Turkey are oppressive towards them because they are too liberal. Elchinova (2005, p. 20) also claimed that those already living in Turkey often did not see migrants as “real” Muslims. On the other hand, the migrants levied the same accusation against the local Turks due to their dishonest behaviours. These misunderstandings accounted for the overall lack of trust between the migrant Turks and the local Turks (Balaban Sali, 2014, p. 20). In Hergüvenç’s fieldwork, one of the migrants emphasized how religious they were noting that: *“When we were children, we used to stop and listen like this when the azan was recited, back when we were children. I am 75 years old, you do the math. My mom would add 5 more rakats to 5 prayer times while praying.”*<sup>6</sup>

---

<sup>6</sup> Interview with N..., (75, female, Visa-free, Kırcaali), 7.11.2019, Sakarya.

As can be seen, the migrants constructed their own identities as being in many ways the opposite of the local people. They held a positive perception of themselves and a negative one of the local Turks. Inclusion/exclusion played a major role in the migrants' construction of their own identities and their views about others.

### **Conclusion**

We used imagology and identity studies as a conceptual framework in our study in order to analyse the perception of Turkish migrants from Bulgaria. Starting from the fact that stereotypes create a group identity, we tried to decipher some of the more common Turkish stereotypes utilized in Bulgarian historiography. To decipher these stereotypes, we examined Communist Party reports and speeches made by Todor Živkov. In this context, imagology became the main conceptual framework that shaped the beginning of our study. Later we used identity theories in order to better understand and analyse migrant perceptions of Bulgaria and Turkey, to Bulgarian and Turks of Turkey after the 1989 forced migration. In this section, we explored field research done on migrants and their memories in order to better understand how they perceived themselves.

The ethnic cleansing policies of the Communist regime in Bulgaria along with the expulsion/forced migration of Turks in 1989 deeply affected the identity and the perception of the Turks in Bulgaria.

The first thing we explored in our study was the perception that the Communist leaders in Bulgaria had of the Turks. These people saw the Turks as an "internal enemy and threat for Bulgaria". This perception played a decisive role in the formation of Turkish migrant group identity after 1989. The ethnic cleansing policies strengthened the Turkish migrants' identity as Turks as well as their belief that Turkey was their true homeland. The heavy handed approach towards the Turks that the Communist regime implement was so oppressive that most of the Turkish migrants we interviewed comments that they had no regrets about their decision to migrate to Turkey. Although they encountered discrimination from the locals in Turkey and have had some problems integrating into larger Turkish society, they nonetheless still preferred to live in Turkey where they were more able to live freely and openly express their Turkish and Muslim identities.

A closer look however also reveals that the Turkish migrants had a relatively better perception about their Bulgarian neighbours (particularly

---

before the ethnic cleansing process began in 1984) than their neighbours in the Turkish towns and cities that they eventually settled in. They had strong prejudices against the local Turkish citizens who originally came from Anatolia, the Caucasus or the Balkans. The most widely held stereotype was that they are conservative and that women have less rights and freedoms in Turkey than in Bulgaria. On the other side, the local Turkish citizens also held some prejudices against the Turks from Bulgaria, often referring them in a dismissive manner as “Bulgarian migrants”.

In summation our research showed that Turkish migrants had positive feelings about their social, economic and educational situation in Bulgaria up until the end of 1984 when the forced assimilation processes were first implemented. The forced assimilation after 1984 changed all of this dramatically. Negative perceptions were held not just against the Communist regime but also their Bulgarian neighbours who partly supported the regime and/or abused and humiliated the Turks with new names or harmful jokes.

While the final years of Bulgaria’s Communist regime soured the opinions of many Turks about Bulgaria more generally, perceptions have begun to change once again in recent years. An important decision made by the Bulgarian Parliament on 11th January 2012 which formally condemned the Bulgarian Communist Party’s policies towards the Turkish minority as ethnic cleansing helped contribute to a more positive image of Bulgaria among the Turkish migrants. However, they still have hesitations about the policy of the Bulgarian governments towards the Turkish minority regarding their language, education and identity since many of the Communist leaders responsible for the ethnic cleansing policies were never tried before a court. More importantly, the Belene prison victim cases still continue today. Many victims believe that the Bulgarian authorities have made a conscious decision to slow things down because, in reality, they do not genuinely regret the Communist regime’s oppressive actions.

### **Bibliography:**

**Bachvarov, M., 1997.** The current ethnic panorama in Bulgaria. *GeoJournal*, 43(3), pp. 215-224.



**Balaban Salı, J. and Fevzi Mehmed, F., 2014.** 1989 Bulgaristan Göçmenlerinin Kültürlerarası İletişim Pratikleri: Eskişehir Örneği. Selçuk Üniversitesi İletişim Fakültesi Akademik Dergisi, 8(3), pp. 5-34.

**Bauman, Z., 2018.** Akışkan Modernite, trans: Sinan Okan Çavuş, 3.ed. İstanbul.

**Borlat, C., 2019.** 1989 Zorunlu Göçü, Göçmenlerin Sosyal Entegrasyonu: Çanakkale Şirinköy Bulgaristan Göçmenleri Üzerine Bir Araştırma. M.A Thesis. Çanakkale On Sekiz Mart University Social Sciences Institute. Çanakkale.

**Bojkov, V. D., 2004.** Bulgaria's Turks in the 1980s: A Minority Endangered. Journal of Genocide Research, 6 (3) (September), pp. 343-369.

**Çiğerci Ulukan, N., 2008.** Göçmenler ve İşgücü Piyasası: Bursa'da Bulgaristan Göçmenleri Örneği. Ph.D. Thesis. Marmara University Social Sciences Institute. İstanbul.

**Çetin, T., 2008.** Bulgaristan'daki Soydaşlarımızın Türkiye'ye Göç Etme Süreçlerini Etkileyen Bazı Değişkenlerin İncelenmesi. Ege Üniversitesi Türk Dünyası Araştırmaları Enstitüsü Türk Dünyası İncelemeleri Dergisi, 8(1), pp. 55-77.

**Dahl, J. M., 2011.** Suicidal Spaniards in Moody Portugal and Other Helpful Stereotypes: Imagology and Luso-Hispanic Cultural Studies. Arizona Journal of Hispanic Cultural Studies. 15, pp. 23-40.

**Danış, D. and Parla, A., 2009.** Nafile Soydaşlık: Irak ve Bulgaristan Türkleri Örneğinde Göçmen, Dernek ve Devlet. Toplum ve Bilim, 114, pp. 131-158.

**De Saussure, L., 2011.** Discourse analysis, cognition and evidentials. Discourse Studies 13(6), pp. 781-788.

**Durmaz, A., 2019.** Bitmeyen Muhacirlik: Balıkesir'de Göçmen Konutlarında Yaşayan 1989 Bulgaristan Göçmenleri. M.A Thesis. Mimar Sinan Güzel Sanatlar University Social Sciences Institute. İstanbul.

**Elchinova, M., 2005.** Alien by Default: The Identity of the Turks of Bulgaria at Home and in Immigration. Developing Cultural Identity in the Balkans: Convergence vs. Divergence. eds. R. Detrez and P. Plas. Brussels, pp. 87-110.

**Er Savaş, G., 2011.** Kültürlerarası İletişimde Dış Göç Olgusu ve Kimlik Sorunu: 1989 Yılında Bulgaristan'dan Türkiye'ye Gelen Türk Göçmenleri Üzerine Bir Çalışma (İstanbul-İkitelli Örneği). M.A Thesis. Marmara University Social Sciences Institute. İstanbul.

**Erendoruk, Ö.O., 2007.** İstiraphaneden Mektuplar. İstanbul.

**Ersoy Hacısalihoğlu, N., 2020.** Bulgaristan Güncel Tarih Ders Kitaplarında Osmanlı-Türk İmajı. Balkan ve Karadeniz Ülkelerinde Güncel Tarih Ders Kitaplarında Osmanlı-Türk İmajı. Ed. M. Hacısalihoğlu. İstanbul. pp. 351-379

\_\_\_\_\_. 2012. 1984-1985 İsim Değiştirme Meselesi ve Uygulamaları. 89 Göçü. Bulgaristan'da 1984-89 Azınlık Politikaları ve Türkiye'ye Zorunlu Göç. eds. N. Ersoy Hacısalihoğlu, M. Hacısalihoğlu. İstanbul, pp. 171-198.

**Fevzi Mehmed, F., 2015.** 1989 Bulgaristan-Türkiye Göçü: "Yeniden Doğuş Süreci" Bellek ve Milliyetçilik İlişkisi. M.A Thesis. Hacettepe University Social Sciences Institute. Ankara.

**Foucault, M., 1972.** The Archeology of Knowledge and the Discourse on Language. New York.

**Güler, G., 2014.** 1989 Bulgaristan Göçmenlerinin Yerel Kültüre ve Tarihe İlişkin Algıları. M.A Thesis. Uludağ University Social Sciences Institute. Bursa.

**Hacısalihoğlu, M., 2020.** Giriş. Balkan ve Karadeniz Ülkelerinde Güncel Tarih Ders Kitaplarında Osmanlı-Türk İmajı. ed. M. Hacısalihoğlu. İstanbul, pp. 13-43.

\_\_\_\_\_, 2012. “89 Göçü” ile İlgili Tarih Yazımı ve Kamuoyu Algıları. 89 Göçü. Bulgaristan’da 1984-89 Azınlık Politikaları ve Türkiye’ye Zorunlu Göç, Eds. N. Ersoy Hacısalihoğlu, M. Hacısalihoğlu. İstanbul, pp. 31-74.

**Hacıoğlu, S., 2012.** Çifte Vatandaşların İsim Tercihler. 89 Göçü. Bulgaristan’da 1984-89 Azınlık Politikaları ve Türkiye’ye Zorunlu Göç. Eds. N. Ersoy Hacısalihoğlu, M. Hacısalihoğlu. İstanbul, pp. 493-588.

**Hall, S., 2003.** “Who Needs Identity”. Questions of Cultural Identity. eds: Stuart Hall, Paul Du Gay. London, pp. 1-17.

**Hergüvenç, B., 2020.** 89 Bulgaristan Göçmenlerinin Kimlik Kurguları Üzerinden Şehre Uyum Pratikleri: Sakarya Örneği. Journal of Balkan and Black Sea Studies, 3(4), pp. 35-62.

**Hocaoğlu, B., 2011.** Bulgaristan’dan Türkiye’ye Yönelik Göçler ve Göçmen Yerleşme Alanlarında Sosyo-Ekonomik ve Mekansal Özellikler. Ph.D. Thesis. Ege University Social Sciences Institute. İzmir.

**Hodges, B. D, Kuper, A. and Reeves, S., 2008.** Qualitative Research: Discourse Analysis. British Medical Journal, 337(7669), pp. 570-572.

**Isov, M., 2005.** Nay različniyat säsed. Obrazät na osmansite (turtsite) i Osman-skata imperiya (Turtsiya) v bälgarskite učebnitsi po istoriya prez vtorata polovina na XX vek. Sofia.

**Kamil, İ., 2018.** Bulgaristan Türkleri ve Göçler. Bulgaristan Komünist Partisi Gizli Belgeleri (1944-1989), vol. IV (1984-1985). Ankara.

**Kamusella, T., 2019.** Ethnic Cleansing During the Cold War: The Forgotten 1989 Expulsion of Turks from Communist Bulgaria, London.

**Kayapınar, A., 2012.** Bulgar Tarihçilerin Komplo Teorilerinden Örnekler ve Bunların Bulgaristan’daki Türk Azınlığa Etkileri. **89 Göçü. Bulgaristan’da 1984-89 Azınlık Politikaları ve Türkiye’ye Zorunlu Göç.** eds. N. Ersoy Hacısalihoğlu, M. Hacısalihoğlu. İstanbul, pp. 99-120.

**Kederli Yapıcı, Z., 2008.** Bulgaristan Göçleri Bağlamında Türk Kadınlarının Göç Anlatıları. Ph.D Thesis. Hacettepe University Social Sciences Institute. Ankara.

**Kolukırık, S., 2006.** Bulgaristan’dan Göç Eden Türk Göçmenlerin Dayanışma ve Örgütlenme Biçimleri: İzmir Örneği. C.Ü. Sosyal Bilimler Dergisi. 30(1), pp. 1-13.

**Kurtuluş, G., 2019.** Bulgaristan Türklerinin Göç Hikayeleri: Bir Sözlü Tarih Denemesi. 2nd ed. Ankara.

**La Barbera, M. C., 2015.** “Identity and Migration: An Introduction”. Identity and Migration in Europe: Multidisciplinary Perspectives. ed: Maria Caterina La Barbera. Madrid, pp. 1-13.

**Nitzova, P., 1997.** Bulgaria: Minorities, democratization, and national sentiments. Nationalities Papers: The Journal of Nationalism and Ethnicity, 25(4), pp. 729-739.

**Özkan, V., 2010.** Bulgaristan Halk Cumhuriyeti’nde Siyasi Otorite ile Ulusal Türk Azınlığı Arasındaki Güç İlişkileri Bağlamında Belene Toplama Kampı (1985-86). M.A Thesis. Hacettepe University Social Sciences Institute. Ankara.

**Özlem, G., 2020.** Türk Romanında 1989 Zorunlu Göçünü Hazırlayan Sebeplerin Etkisinde Türk ve Bulgar İmgele. Balkanlarda Türk Dili ve Edebiyatı Araştırmaları Dergisi, 2(1), pp. 109 – 131

**Öztürk, S., 2012.** Devlet Hikayeleri, Kimliğin Kaybı ve Yeniden/Yenisinin Kazanılması. 89 Göçü: Bulgaristan’da 1984-1989 Azınlık Politikaları ve Türkiye’ye Zo-

runlu Göç. eds: Neriman Ersoy – Hacısalihoğlu, Mehmet Hacısalihoğlu. İstanbul, pp. 235-267.

**Parla, A., 2005.** “Terms of Belonging: Turkish Immigrants from Bulgaria in the Imagined Homeland”. PhD Thesis, New York University.

**Ragaru, N., 2001.** Islam in post-communist Bulgaria: An aborted "clash of civilizations"?. Nationalities Papers: The Journal of Nationalism and Ethnicity. 29(2), pp. 293-324.

**Reyes, A., 2014.** Identity Construction in the context of Migration. *Il Saggiatore Musicale*, 21(1), pp. 105–121.

**Schnapper, D., 2005.** Sosyoloji Düşüncesinin Özünde Öteki ile İlişki. trans: Ayşegül Sönmezay. İstanbul.

**Solakoğlu, S. and B. Hergüvenç., 2021.** Turkish Historiography on the Forced Migration of the Turks of Bulgaria to Turkey of 1989. *Balkanistic Forum*, 30(1), pp. 74-83.

**Şen, H., 2004.** Çoklu Sadakat Ekseninde Türk Göçmenleri. *Sosyoloji Dergisi*. c.(12-13), pp. 37-60.

**Şencan, N., 2013.** Türkiye’ye Göç Eden Bulgaristan Türkü Kadınların Göç Hikayeleri. Ph.D. Thesis. Yeditepe University Social Sciences Institute. İstanbul.

**Şerefli, A. Ş., 1990.** Türk Doğduk, Türk Öldük: Soy Kırımı Yaşantıları, Ankara.

**Şimşir, B., 2012.** Bulgaristan Türkleri, 2nd ed. Ankara.

**Turner, J. C., 1987.** Rediscovering the Social Group. Oxford, New York.

**Türker, M., 2010.** Zulmün Ateş Çemberinden Anılar Belene Adası, 4. ed. İstanbul.

**Van Dijk, T. A. 2018.** Söylem ve Göç. Nitel Göç Araştırmaları: Uygulanabilir Hedefler, Açık Uçlu Sorular ve Çok Boyutlu Cevaplar. Avrupa Göç Çalışmalarında Nitel Araştırmalar eds: Ricard Zapata- Barrero, Evren Yalaz. trans: Ayşecan Ay. et al. İstanbul. pp. 266-287.

**Vassilev, R. 2002.** Bulgaria’s Ethnic Problems. *East European Quarterly*, XXXVI (1) March, pp. 103-125.

**Vasileva, D., 1992.** Bulgarian Turkish Emigration and Return. *International Migration Review*, 26(2), pp. 342-352.

**Vogt W. P. et al., 2014.** Selecting the right analyses for your data: Quantitative, qualitative, and mixed methods. New York.

**Volkan, V., 2007.** Kimlik Adına Öldürmek. trans: Medine Banu Büyükkal. İstanbul.

**Yiğit, Y., 2012.** Balıkesir’de 89 Göçü. Balıkesir Üniversitesi Sosyal Bilimler Enstitüsü Dergisi. 15(28-1), pp. 158-173.

**Yorulmaz, S., 2012.** 1984-1989 Yılları Arasında Bulgaristan Türklerine Yönelik Uygulanan Asimilasyon Politikaları ve Göç Deneyimleri. M.A Thesis. Maltepe University Social Sciences Institute. İstanbul.

**Zacharasiewicz, W., 2010.** Imagology Revisited. Amsterdam-New York.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.4>

*Luydmila V. Klimovich*  
*Ulyanovsk State Pedagogical University (Russia)*  
[lusek84@yandex.ru]

*Leonid A. Shaipak*  
*Ulyanovsk State Pedagogical University (Russia)*  
[shaipak@rambler.ru]

## **Higher Education Received by Young Russian Emigrants in European Countries in the 1920s-1930s and Problems of further Employment (Based on Materials of Czechoslovakia and France)**

**Abstract:** *The article presents the process of getting higher education by students, emigrants from Russia. Special attention is paid to the organizations that rendered assistance in the admission and training of students at the universities of Czechoslovakia and France. The Committee on Education for Russian students in Czechoslovakia (CERSC) and the Committee on Higher Education for Russian youth abroad ("Fedorov Committee") contributed to the organization of student education by providing scholarships, by exempting them from paying tuition fees, and providing a dorm. The activities of these organizations were carried out at the expense of the governments of the host countries and benefactors.*

*The article notes that getting a European education contributed to the successful adaptation of Russian youth in a foreign society with different culture, which gave them an opportunity to find a job. The analysis of the documents showed the problems that graduates-emigrants of European universities encountered, in Czechoslovakia in particular. The low demand for personnel of intellectual labor led to the fact that many had to get a craft profession after graduating from a university. The Association of Russian Graduates of Higher Educational Institutions in the Czech Republic (ARGHEI) arranged such short-term courses. Owing to the assistance of this organization, young emigrants were able to get jobs in other countries.*

*The article is based on the analysis of documents from the National Archives of the Czech Republic (Czechia) and the Library-Fund "Russian Diaspora" (Russia).*

**Key words:** *Russian diaspora; Russian emigration; adaptation; students; higher education; employment; Czechoslovakia; France.*

After the revolution of 1917 and the Civil War in Russia, about 2 million Russian citizens fled the country to live abroad. Many of them were adolescents and young people. Their education and socialization process were interrupted due to drastic changes in their country. It was the younger generation that in the future was to become the foundation to form the "Russian World", since it retained and handed down the traditions, customs, culture and history of Russia to their descendants. The problems of adaptation in the foreign cultural community are closely related to the issues of receiving education in European universities, so that in the future it would be possible to get a job, to take a certain social position.

In the 1920s, Prague became the center of student life, thanks to the fact that in the early 1920s the Czechoslovak government invited Russian emigrant youth to get higher education at the universities of the young republic. Dormitories were provided for living, some of the students lived in private apartments: "Students in Czechoslovakia are accommodated in dormitories: Slobodarnya - 430 people, Khudobinets - 167 people, Strashnice - 70 people and about 250 people in barracks, 720 - in private apartments"(Czechoslovak help, 1924, p. 10; Biryukova, 2005, p. 105).

By the mid-1920s, 2,133 students of the Russian emigration studied at the universities of Czechoslovakia (National Archive of the Czech Republic, Ka. 4. Inv. 47). According to the Russian Trade and Industrial Committee in Czechoslovakia, by January 1925, 4620 Russian emigrants were studying at the expense of the government of Czechoslovakia (National Archive of the Czech Republic, Ka. 4. Inv. 52).

The age of students from Russia was higher than their fellow students from Czechoslovakia, according to data for 1924: "at the age of 25 to 30 - 1576 people (45%); from 20 to 25 - 1085 people (31%); from 30 to 35 - 530 people (15, 2%); 35 years and older - 167 people (4.8%). Of the total number of respondents, there were 2967 men (85.5%) and 502 women (14.5%)" (Biryukova, 2005, p. 69).

Russian youth headed for Czechoslovakia to study there from different countries, where they ended up as a result of emigration from Russia. In a letter from representatives of the Student Section of the Russian Cultural Educational Society at the Russian refugee camp in Sidi-Bishr to Professor A.S. Lomshakov<sup>1</sup>, former students who fought in the Volun-

---

<sup>1</sup> Lomshakov Alexey Stepanovich (1870-1960) - in Russia he was a professor at the St. Petersburg Polytechnic Institute named after Peter the Great. Member of the 1st State

teer Army, asked him to help them get into higher educational institutions of Czechoslovakia to continue their education: "The complete lack of material resources and higher educational institutions for Europeans in Egypt, on the one hand, made our relations with Western Europe very difficult and on the other hand, it did not give the opportunity to enter higher education institutions" (National Archive of the Czech Republic, Ka. 9. Inv. 117\_2).

The Committee on Education of Russian Students in Czechoslovakia (CERSC) played an important role in receiving higher education by Russian refugees established on August 12, 1921 in Prague. The fundamental principles of the CERSC activities were:

- helping students regardless of national, religious and political affiliation;
- students should demonstrate the desire and ability to study at the university, as well as need material support;
- encouraging students to complete their studies successfully and use the knowledge gained for the good of the Fatherland (Russians in Prague, 1928, p. 82).

The committee showed itself as an apolitical association, that is why students had to sign a statement when moving to Prague to refuse political campaigning and participation in political associations (National Archive of the Czech Republic, Ka. 4. Inv. 36).

Documents testify that not all students adhered to this rule: "recently, cases of strained relations between students and student organizations, attacks on each other, reaching violent clashes, excesses near the announcement boards, etc., have been observed especially often". These circumstances led to the fact that all announcements to be posted on the boards had to be approved by the CERSC (National Archive of the Czech Republic, Ka. 3. Inv. 36).

Most often, students chose the medical, engineering, legal and agricultural programs of study (Russians in Prague, 1928, p. 75). They could get an education in the chosen course in Prague: at Charles University, the Polytechnic Institute, the Commercial Institute; in Brno: at the University of T.G. Masaryk, Agricultural Institute, Polytechnic School, at the University of A. Komensky in Bratislava (National Archive of the Czech

---

Duma from the Cadet Party. After emigrating from Russia, he lived in Prague. He headed the CERSC, the Association of Russian émigré organizations in Czechoslovakia, as well as the Union of Russian academic organizations abroad. (For more information: Savitsky, 2001-2002, pp. 562-567).

Republic, Ka. 3. Inv. 36). Instruction at universities was conducted in Czech, therefore, in the first year, for all students dependent on the CERSC, a Czech language course was compulsory, followed by taking exams (National Archive of the Czech Republic, Ka. 3. Inv. 36).

Subsidies from the Ministry of Foreign Affairs of Czechoslovakia were the main source of income for the CERSC. According to the CERSC estimates, 10 thousand korunas are needed per year for the full maintenance of one student, while the subsistence level was 600 korunas per month. The ratio of these amounts confirms the importance of the scholarships awarded under the "Russian Aid Campaign"<sup>2</sup>, without which it would be difficult for emigrant youth to get a higher education (National Archive of the Czech Republic, Ka. 3. Inv. 36).

The expenditures per scholarship holder gradually decreased, if in 1922 about 1000 Czech korunas were spent in total per month, then in 1926 it was about 500 korunas, but it is worth noting that the number of beneficiaries has increased over the years from 1848 to 2835 people, 1928, p. 72).

The majority of students received full support, additional family subsidies, which allowed them to focus on their studies. The study commission under the CERSC conducted an academic performance audit three times a year, following the results of which one or another type of assistance was provided. The scholarship was reduced for the student with poor academic progress or its payment ceased completely. But this did not mean that his learning was over, he could continue to study, paying for his studies on his own (National Archive of the Czech Republic, Ka. 3. Inv. 36).

To receive a scholarship, it was necessary to write a petition to the CERSC: "Being completely without means of subsistence, I will have to give up higher education in case of rejection as a dependent," wrote a third-year student of the Czech Higher Technical School in Prague in 1922 (National Archive of the Czech Republic, Ka . 6. Inv. 84). In the document attached to the questionnaire, it was indicated what exams and when they were passed, what sources of income were available, the place of study.

---

<sup>2</sup> "The Russian Aid Campaign" is a program to help emigrants from Russia, which had been implemented by Czechoslovakia since 1921. It included the provision of temporary shelter, financial and organizational support for the education of children of emigrants, students, scientists and cultural workers.

The number of people wishing to get an education in Czechoslovakia exceeded the possibilities of the financial assistance program, which potential candidates were notified about in September 1922 by the CERSC: "... at present all scholarships are not only completely replaced, but there is even a significant surplus, and therefore it is absolutely impossible to satisfy in any way the applications of those arriving." (National Archive of the Czech Republic, Ka. 3. Inv. 36). Not all students studied diligently and fulfilled the duties assigned to them, for example, the head of the electro-mechanical section, 4<sup>th</sup> year student Sergei Valerianovich Drachuk, was excluded from the financial assistance program of the CERSC and deported from Czechoslovakia: "for forgery, deception and wasteful spending of the amounts entrusted to him for academic needs by the Committee and the Section" (National Archive of the Czech Republic, Ka. 3. Inv. 36). To coordinate the work, student sections were set up at different faculties in different educational institutions, which were united in the Bureau of Student Sections. The Union of Family Students acted separately, which drew attention to the plight of family students, especially with children: "The situation is more aggravated due to the fact that it is almost completely impossible for a family student in general, and with children in particular, to find a room in Prague and an apartment, like a nightmare, persecuting the family student is placing a new burden on our modest budget" (National Archive of the Czech Republic, Ka. 6. Inv. 85).

There were outpatient departments and dental clinics under the CERSC, where students could receive medical care, free of charge (Klimovich, Suvorov, Shaipak, 2020). The health of the students was poor, for example, there were many tuberculosis patients: "Most of them are physically and mentally disabled. This happened as a result of previous illnesses and experienced horrors of war. Most of them are ill with tuberculosis, mainly in Prague, where climatic conditions were unfavorable for them" (Russians in Prague, 1928, p. 75). About 50% of the examined students had some form of tuberculosis (Klimovich, Suvorov, 2019).

The support of the Ministry of Foreign Affairs was gradually reduced, and since 1930, the CERSC had been in the process of termination: "The supposed complete termination of the Committee was fixed for the end of 1930. By this time, most of the remaining students will have completed their education. After 1929, only about 500 students will stay" (Russians in Prague, 1928, p. 77). The world economic crisis and the reduction of the "Russian Aid Campaign" threatened with the closure of the CERSC in 1931, only "thanks to the President of Czechoslovakia



Masaryk, who contributed about 1 million korunas to the committee. The committee continued its work<sup>3</sup>" (Biryukova, 2005, p. 108).

The CERSC carried out its activities till 1935, in 1926 it was merged with the Committee on Education of Ukrainian Students and became known as the Committee on Education of Russian and Ukrainian Students in Czechoslovakia. There were two sections in it: Russian and Ukrainian one, which included a department for student affairs, a department in charge of teaching manuals, an instruction department, a financial department and an accounting department. Most of the CERSC employees were Russian emigrants. Graduates of higher educational institutions of Czechoslovakia expressed their gratitude to them: "Allow me to express my sincere gratitude to you and in your person all those who contributed to my getting higher education at the Czech Polytechnic Institute in Prague, ... We ask you to convey special gratitude to the government and the Czech people, who made it possible to realize our aspirations" (National Archive of the Czech Republic, Ka. 7. Inv. 102).

Gradually, everyone received higher education who did not manage to get it in Russia, and in the early 1930s the question arose about getting education already by emigrants' children, those who finished schools in Czechoslovakia (More about the activities of Russian schools: Klimovich, Book Review, 2020 ). The Test Commission under the Board of the Union of Russian Academic Organizations Abroad played an important role in the education of children and young people in emigration: "Young people who came from Soviet Russia after finishing school of the 11<sup>th</sup> grade there, whose certificates were not recognized by foreign governments were among the people who took exams at the Testing Commission, in addition to the children of Russian emigrants. Finally, the American "YMCA" applied to academic organizations with a request to conduct academic tests for persons taking part-time courses organized by the named American Society" (National Archive of the Czech Republic, Ka. 8. Inv. 110).

After graduating from the university, many graduates could not find work, primarily those who received humanities education, the demand for them was low. The general economic situation in Czechoslovakia also played its role: "The Czechoslovak Republic, thanks to the economic crisis and small capacity, is able to provide jobs according to one's specialty for a very small percentage of Russians who graduated

---

<sup>3</sup> We have no information what funds were used to provide financial assistance: personal or state ones

from the Higher Schools in the Czech Republic" (National Archive of the Czech Republic, Ka. 4. Inv. 52). In 1925, graduates of the Faculty of Law organized the Bureau of Labor, who graduated from the Russian Faculty of Law in Prague with the aim of "coordinating actions and finding ways and opportunities to get any job, both within the Czech Republic and outside it" (National Archive of the Czech Republic, Ka. 4. Inv. 52). Thanks to the cooperation of the alumni association with the Czechoslovak Red Cross and the Russian Zemstvo-City Committee for Assistance to Russian Citizens Abroad (hereinafter referred to as Zemgor), 6,898 free meals were provided in 1925, in the amount of 17,718 korunas, a dormitory for graduates with 70 places was established. The sum is insignificant, considering that about 10,000 korunas per year were spent on one student under the "Russian Aid Campaign" (National Archive of the Czech Republic, Ka. 4. Inv. 52). Unfortunately, the main goal of the organization to assist in employment was not achieved: in 1925, jobs were provided for 40 graduates, but it was associated with manual labor, mainly in construction.

In such a situation, the Board of the Labor Office took a decision to find an opportunity "for colleagues to receive additional vocational education and - to send them to other countries" (National Archive of the Czech Republic, Ka. 4. Inv. 52). The three-month courses for painters organized by the Union of Engineers with the support of Zemgor allowed 42 graduates to do training and get a job, both in Czechoslovakia and in France. The joint activities of Zemgor in Prague and in Paris were successful: "152 visas were sent to the Bureau members to enter France, which greatly eased the difficult situation for those who had completed training" (National Archive of the Czech Republic, Ka. 4. Inv. 52). On the one hand, temporary work brought income, on the other, there were fears that "the special knowledge acquired with such hard work, without applying in life, would be quickly forgotten, and difficult working conditions would entail physical and spiritual degradation" (National Archive of the Czech Republic, Ka. 4. Inv. 52).

Problems with employment were not only among specialists in humanities, later, graduates of technical courses joined graduates-lawyers, and in October 1925 it was decided to rename the Bureau of Labor into the Association of Russian Graduates of Higher Educational Institutions in the Czech Republic (ARGHEI) (National Archive of the Czech Republic, Ka. 4. Inv. 52). The main characteristics of the ARGHEI were: "a purely businesslike, apolitical organization of graduates to protect their professional and material interests" (National Archive of

the Czech Republic, Ka. 6. Inv. 74). The ARGHEI had its branches in Brno, Pshibram, Bratislava, provided assistance in the form of loans, mainly when leaving for work outside Czechoslovakia. Loans ranged from CZK 50 to CZK 300, timely repayment provided an opportunity to help more members, the more the influx of new members increased. Cutting and sewing courses were opened for girls, all members of the ARGHEI could attend courses in foreign languages (English, German, French and Serbian), opened with the assistance of the People's University in Prague (National Archive of the Czech Republic, Ka. 4. Inv. 52) ... In February 1926, a representative office of the ARGHEI was opened in France.

The Russian Trade and Industrial Committee in Czechoslovakia applied to the International Labor Office in Geneva with a request for assistance in the employment of graduates of Czechoslovak universities. The most acute issue was the employment of lawyers, according to March 1925 data: "The first group of 160 people is distributed according to professions as follows: lawyers - 107, chemical engineers - 14, electrical engineers - 6, mechanical engineers - 9, doctors - 8, agricultural engineers - 8, civil engineers - 3, chauffeurs - 2, mining engineers - 1, master of pharmacy - 1 (National Archive of the Czech Republic, Ka. 4. Inv. 52). Such a number of lawyers in search of work was also explained by the fact that they graduated from the Russian Faculty of Law in Prague, which taught according to Russian pre-revolutionary programs and prepared graduates for work in Russia, to a lesser extent in Czechoslovakia, where Russian pre-revolutionary law was naturally not in demand. (Mikhailchenko, 2017): "All these young people have already overcome many obstacles and difficulties on their way. They have been working hard these last three or four years, taking courses in higher educational institutions and preparing to return to Russia and bring it the acquired knowledge. But the doors of Russia are still locked, and our youth are forced to continue the struggle for existence in foreign countries" (National Archive of the Czech Republic, Ka. 4. Inv. 52).

The director of the International Labor Office, Albert Thoma, responded favorably to the request and promised to assist in the employment of Russian youth, but emphasized that it would be difficult: "I do not conceal from myself the difficulties which the task of finding jobs in France for Russian intellectual workers is connected with. You know that liberal professions in our country (in France – noted by L.K.) extremely overloaded and even for our citizens such vacancies are rare. But, despite this, before admitting the idea of giving them the vacancy of ordinary

workers, I will take some steps and try to get them vacancies corresponding to their knowledge ... I, for my part, will immediately enter into relations on this issue with authorities of my homeland"(National Archive of the Czech Republic, Ka. 4. Inv. 52).

Questionnaire cards for 163 graduates were promptly prepared and sent to the International Bureau of Labor in April 1925, including for the consideration of their candidates for work in the United States and South America (National Archive of the Czech Republic, Ka. 4. Inv. 52) ... In total, in April 1925 there were 3367 Russian students and about 1600 Ukrainian students. By July 1925, 246 people were to graduate from educational institutions, by January 1926, 409 people, by July 1926 another 412 people (National Archive of the Czech Republic, Ka. 4. Inv. 52).

The situation with the employment of emigrants was difficult throughout Europe (For more information on the situation in the Kingdom of Serbs, Croats and Slovenes, see: Klimovich, Kovaleva, 2019 pp. 54-55). According to the data of the Bureau of Labor of the League of Nations, "there were 185,000 people unemployed Russians in different European countries" as of January 1, 1925 (with Turkey). Of these, over 100,000 are farmers and all kinds of agricultural workers, 16,000 are artisans and skilled industrial workers and 7,700 are persons of liberal professions and intelligent labor " (National Archive of the Czech Republic, Ka. 4. Inv. 52). The Bureau of Labor of the League of Nations saw a way out in solving this problem to send Russian emigrants to Brazil, Argentina, Uruguay, since: "South America is almost the only country suitable for emigration, since all English dominions are almost closed for Russians, and for other nations" (National Archive of the Czech Republic, Ka. 4. Inv. 52). But the demand for intelligentsia, scientists was extremely low, South American countries were ready to accept mainly agricultural workers.

Thanks to the activities of ARGHEI, 73 people left Czechoslovakia in 1929, 38 of them to France, 17 to the USA, despite the fact that the Bureau of Labor of the League of Nations directed the departure of Russian specialists to South America, in 1929 9 left for Argentina people, 1 to Paraguay, 1 person to Brazil (National Archive of the Czech Republic, Ka. 6. Inv. 74). For resettlement, emigrants received loans through ARGHEI from the Bureau of Labor of the League of Nations, through their local representations, as well as from the Ministry of Foreign Affairs of Czechoslovakia, through the cash office of the Committee on Education of Russian and Ukrainian students in Czechoslovakia: "Later, members of ARGHEI used loans from this fund up to 1000 korunas for one per-

son"(National Archive of the Czech Republic, Ka. 6. Inv. 74). In his reports, the chairman of ARGHEI emphasized that "We all need to be imbued with the awareness of the need for mutual support and assistance, because in this consciousness is the key to the success of the fight against refugee unemployment and destitution" (National Archive of the Czech Republic, Ka. 6. Inv. 74).

It is worth noting that assistance to unemployed Russian youth in Czechoslovakia came from the "Czech Red Cross, the Zemgor Committee", the Committee on Education to Russian students in the Czechoslovak Republic, the Agricultural Unity, the Society of Slavic Reciprocity and the Trade and Industrial Committee "(National Archive of the Czech Republic, Ka. 6. Inv. 74). For its activities, ARGHEI, through the Committee on Education to Russian and Ukrainian students, received a monthly subsidy from the Ministry of Foreign Affairs of Czechoslovakia in the amount of 2500 korunas (National Archive of the Czech Republic, Ka. 6. Inv. 74). The activities of ARGHEI gradually expanded, in 1930, the members of ARGHEI had the opportunity to receive advice on legal issues, thanks to the appearance of a lawyer-consultant in the organization's staff (National Archive of the Czech Republic, Ka. 6. Inv. 74). In 1930, 95 people were employed, financial assistance was provided to 229 emigrants in the form of loans, allowances, money guarantees to the High Commissioner of the League of Nations for loans received by members of ARGHEI for resettlement (National Archive of the Czech Republic, Ka. 6. Inv. 74).

Students among Russian emigrants were not only in Czechoslovakia, therefore, in order to coordinate activities and assistance to students in 1922 in Paris, at the initiative of M.M. Fedorov M.M. Федорова<sup>4</sup>, the Committee on Higher education for Russian youth abroad was set up. Thanks to the efforts of the "Fedorov Committee", this is the unofficial name it received, it was possible to obtain government allocations for scholarships to Russian students. Departments of the "Fedorov Committee" operated in France, Belgium, Czechoslovakia, Germany, Italy, Poland and other countries till 1932. The committee was disbanded in 1940 with the beginning of the German occupation. The fruitful activity of the Committee was possible thanks to its head M.M.

---

<sup>4</sup> Fedorov Mikhail Mikhailovich (1858 - 1949) - Russian public figure and industrialist. In February-March 1906, Minister of Trade and Industry of the Russian Empire. One of the leaders and shareholders of the Russian Society of Shipping and Trade. From 1920 he emigrated to France.

Fedorov: "For Mikhail Fedorov, it was fundamentally important to form an elite that would be able to restore Russia of the future, liberated from Bolshevism, and for this purpose university education should be given to Russian emigrant youth" (Fedorov, 2020, p. 168).

The "Fedorov Committee" was in charge of the distribution of scholarships for students who planned to continue their education or start it anew. In 1922/1923, the French Government allocated an amount of 450,000 francs in the form of scholarships, the amount gradually decreased and in 1931 reached 125,000 francs (Fedorov, 2020, p. 170). The allocations from the French government were important, but they were not enough to provide all those who wanted to pursue higher education. Then the Committee began to look for benefactors in order to be able to grant their own scholarships. The main benefactor was the Deterding family, which donated about 700 thousand francs to the Committee over the period from 1922 to 1929 (Fedorov, 2020, p. 171). For 1922-1933, the "Fedorov Committee" was able to allocate 2,182 scholarships in the amount of 3,700,000 francs, the French government provided 937 scholarships (Fedorov, 2020, p. 172). The scholarship ranged from 50 to 350 francs, which was not enough to cover expenses for accommodation, so the students had to earn extra money (Fedorov, 2020, p. 172). M.M. Fedorov personally traveled across European countries to coordinate local committees and search for benefactors. In 1929, he visited the United States, was able to obtain permission for entry visas to the United States for Russian students, and monetary scholarships from the Russian Student Fund.

The personal files of students, recipients of scholarships are kept in the archives of the "Fedorov Committee" in the Library-Fund "Russian Diaspora" (Moscow). The personal dossier of Vladimir Ananyevich Zlobin, a writer and friend of D. S. Merezhkovsky and Z. N. Gippius, testifies to how difficult it was to get a scholarship and have it extended. His petition for a scholarship dated February 3, 1923 for admission to the first year of the Faculty of History and Philology of Sorbona contains appendices in the form of an application in which he reflected the fact that he studied in Russia till the 4<sup>th</sup> year at the Faculty of Law, the guarantor was D.S. Merezhkovsky. The set of documents contains a copy of the certificate of completion of training in Russia, a resume. The process of applying for a scholarship was long; in August of the same year, D. S. Merezhkovsky (Library-Fund "Russian Diaspora", D. 570, L. 13) applied to the committee with a request to support Zlobin with a scholarship. Zlobin's letter dated March 11, 1924, testifies that he received an Ameri-

can scholarship, but payments were made with a delay (Library-Fund "Russian Diaspora", D. 570, L. 16). To have the scholarship extended, a letter from Professor N. Kulman<sup>5</sup>, was required, in which he described in detail Zlobin's merits for the past academic year (Library-Fund "Russian Diaspora", D. 570, L. 17).

Failure to pass exams denied the right to a scholarship. This situation happened with Rostislav Kolchak, the son of General Alexander Kolchak. In this situation, a well-known figure in the Russian diaspora, Konstantin Nikolayevich Gulkevich, sent his petition to the chairman of the Fedorov Committee, referring to the fact that Kolchak's widow wrote a letter to the High Commissioner for Refugees F. Nansen about this situation. The answer was not long in coming: "Rostislav Kolchak, the son of Admiral Kolchak, certainly enjoyed our special respect ... having received our scholarship, he entered the Faculte de Droit at the Sorbonne and at the same time at the Ecole libre des Sciences Politiques. But since he could not pass the exams in either school, then according to our rules he was deprived of a scholarship this year... But I, nevertheless, announced that if he continues to study on his own and will move on to the next year, then I will immediately restore his scholarship", "the chairman of the" Fedorov Committee "correctly explained the refusal of a scholarship in a letter dated June 7, 1929 (Library-Fund "Russian Diaspora", D. 3632, L.4). In 1927, Rostislav Kolchak entered the Higher School of Political Science, but the widow Sofia Kolchak did not have the funds to pay tuition for her son, the Fyodorov Committee scholarship was his opportunity to get education.

Since 1927, Sofia Kolchak herself had been living in a boarding house for lonely sick emigrants in Saint-Genevier-des-Bois (History of the Admiral's Family, 2019, p. 62). Rostislav Kolchak was able to get an education, thanks to the help of the All-Diaspora Association of Russian Maritime Organizations, which provided an allowance for treatment, to widows, to the elderly for raising children and to complete education (History of the Admiral's Family, 2019, p. 77). In August 1931, R. Kolchak successfully passed the exams, but "the managers decided to continue to give him a monthly allowance at the same rate until he found a service with a salary that he could live on" (History of the Admiral's

---

<sup>5</sup> Kulman Nikolai Fedorovich (1871 - 1940) - a specialist in the study of Russian literature and social thought of the first half of the 19th century. In exile in Paris, he taught at Sorbonne, was the Dean of the Russian department of the Faculty of History and Philology.

Family, 2019, p. 79). Later, thanks to the recommendations of Admiral Lakaz (former French Naval Minister) and Vice Admiral Kedrov, Rostislav Kolchak got a job at the bank of Algeria (French colony) (History of the Admiral's Family, 2019, p. 80).

From the memoirs of M.M. Fedorov's grandson, M.M. Fedorov "tried to meet with each of the students personally, especially those who did not demonstrate outstanding academic performance in their studies. He reminded them how difficult it was to raise money for their scholarships and that not all Russian students manage to get scholarships, and most importantly, about their duty to the Russian people to prepare the future of Russia. And of course, he threatened to deprive them of their scholarships in case of unsatisfactory grades for their studies" (History of the Admiral's Family, 2019, p. 175).

Prince Grigory Trubetskoy solicited for a scholarship to Leo Tolstoy's grandson Peter Mikhailovich Tolstoy, who entered the lyceum in 1928 to prepare for admission to the higher agronomic school (Library-Fund "Russian Diaspora", D. 3997, L. 1-3). Unfortunately, it was more difficult to get financial support "without a big name". In reply to a letter from his brother E. A. Kormilyov<sup>6</sup> with a request for a scholarship, M. M. Fedorov wrote: "The Committee does not have any permanent fund or budget, and the funds that it manages to collect are far from sufficient to meet all the current needs of the student body. The position of the Fedorov Committee is very difficult and one can hardly expect it to improve by the next academic year" (Library-Fund "Russian Diaspora", D. 4069, L.2).

In the early 1930s, the economic crisis had an effect on the amount of aid to students from Russia. The budget of the "Fedorov Committee" was greatly reduced, Fedorov himself connected this with the official recognition of the USSR by Western countries (Fedorov, 2020, p. 176). In the summer of 1931, Professor V.E. Brunst<sup>7</sup> applied to the Fedorov

---

<sup>6</sup> Kormilyov Evgeny Aleksandrovich (1909 - 1992) - in exile since 1920, studied at the Crimean Cadet Corps in city of Belaya-Tserkov, and then in the Don Corps in Gorazde (Bosnia), which he graduated in 1929. We have no information about his learning at higher education institutions. It is known that he worked as a land surveyor in the Kingdom of Yugoslavia, in 1950 he moved to Belgium, and in 1956 to the United States. In the USA, he worked as a road designer in various companies. He actively participated in the life of the Russian emigration to the United States.

<sup>7</sup> Brunst Viktor Emilievich (1864 - 1932)- scientist - agronomist, headed the Department of Agronomic Assistance at the Stebutov Institute of Agriculture (since 1920 - the Petrograd Agricultural Academy named after I. A. Stebut). In exile he lived



Committee for a scholarship to his son Dmitry Brunst, who was to complete the final year at the Prague Polytechnic Institute: "I ask you to assign him a scholarship for one year in [the amount of] 200 francs per month. I am sure that this assistance will go to a worthy person, my son is an excellent worker, and at the first opportunity he will repay this debt to enable someone else to use your assistance" (The letter to V.E. Brunst, 1931, p. 42). D. Brunst did not receive a scholarship, the "Fedorov Committee" lacked funding, Henri Deterding, a philanthropist providing half of the budget of the "Fedorov Committee" in connection with the global economic crisis, ceased funding (Vovk, 2020, p. 43).

Committees on assistance in getting higher education in different countries of the Russian presence helped students to continue their learning and in the future to get a diploma and, accordingly, a job. The forms of student support were different: scholarships, exemption from tuition fees, free meals, loans, assistance with medical treatment. In a situation when returning home was impossible, it was necessary to integrate into the social life of the host community, for this the young person had to have a competitive education to get a job. The emigrant youth strove to get a higher education, which would not only improve their social status, but also have a decent job. Unfortunately, the general economic situation and the lack of demand for specialists in intellectual work, many graduates were forced to receive additional professional education to find a job.

### **Bibliography:**

**Biryukova, K.V. 2005.** Russian student emigrant unions in Central and Eastern Europe in the 1920s - 1930s. Dis ... Cand. hist. sciences. 07.00.02. 197 p.

Library-Fund "Russian Diaspora", F.13. Archive of the Central Committee on the higher education provision to Russian youth abroad ("Fedorov Committee"). Inv. 2.

**Vovk, A. 2002.** The learning of Dmitry Brunst in Prague: to the history of the NTS, Posev. 2020, 2, pp. 41-43.

**The family history of Admiral A.V. Kolchak in France. 2020 / L.V. Abramenko.** Memories. Poems / S.F. Kolchak; text and notes comp., prepared by L.V. Abramenko. - Moscow: Vikmo-M.

**Klimovich, L.V. 2020.** Book Review: Russian school in exile. From Belgrade to Harbin, *Ab Imperio – Studies of new imperial history and nationalism in the post-soviet space*, 3. pp. 443-449. DOI: 10.1353 / imp.2020.0079

---

in Czechoslovakia, worked as a professor at the Russian Institute of Agricultural Cooperation in Prague.

**Klimovich, L.V. Kovaleva, D.N. 2019.** A Social and Cultural Profile of the Younger Generation of the Russian Emigration in the 1920-1930s (Based on the Documents of the Archive of Yugoslavia), *Balkanistic Forum*, 2, pp. 46-59.

**Klimovich, L.V., Suvorov, V.V. 2019.** The spread of tuberculosis in the student milieu of Russian emigrants in Czechoslovakia in the 1920s: statistics, control measures, outcomes, *Russian Open Medical Journal*, 8, e0420. DOI: 10.15275/rusomj.2019.0414

**Klimovich, L.V., Suvorov, V.V., Shaipak, L.A. 2020.** International Committee of the Red Cross: supporting, protecting, and providing medical care to Russian emigrants in the 1920s-1930s. *Russian Open Medical Journal*, 9, e0420.

**Mikhalchenko, S. I. 2017.** Archives of the Russian Faculty of Law in Prague in the State Archives of the Russian Federation, *Bulletin of the Archivist*, 2, pp. 185-196.

Národní Archiv ČR [National Archive of the Czech Republic]. F. 746. Komitét pro umožnění studia ruským a ukrajinským studentům v ČSR, Praha (Committee on Education of Russian and Ukrainian Students in the Czechoslovak Republic, Prague)

The letter from V.E. Brunst to M.M. Fyodorov dated June 12, 1931, Prague // Quoted according to: **Vovk, A. 2020.** The learning of Dmitry Brunst in Prague: to the history of the NTS, *Posev*. 2, pp. 41-43.

Russians in Prague: 1918-1928. **1928.** / Ed. by S.P. Postnikov. Prague.

**Savitsky, P. N.** Memoirs about A. S. Lomshakov: 1870-1960. **2001-2002**, Notes of the Russian Academic Group in the USA. Vol. XXXI. pp. 562-567.

*Czechoslovak help to the Russian and Ukraine emigration. 1924.* Praha: Ministry for Foreign Affairs

**Fedorov, M. 2019.** Between the crown and the anvil. The life and destiny of the tsarist minister M.M. Fedorov 1858-1949. M. : Russian way, 240 p.

*Dmitry Tkachenko*

*North Caucasus Federal University, Stavropol' (Russia)*

[tkdmsg@rambler.ru]

*Tatiana Kolosovskaya*

*North Caucasus Federal University, Stavropol' (Russia)*

[kolosowskay@yandex.ru]

## **To Reveal the Caucasus Cultures of XIX Century: Orientalism in Russian Caucasus War Period Travelogues\***

**Abstract:** *The paper is concerned with the issue of textual visualisation of Caucasus in Russian travelogues performed in 1820-1830-th. – the decades of the Caucasus War escalation. Taken as example entries from the travelogues of I.T. Radojitsky and V.B. Bronevsky published in Russian Empire in early XIX c., the authors show deep connections of the outlook on the region and people inhabited it with the foundation of the Orientalism as an approach to describing native people of the Imperial frontier.*

*The research underlines the importance of scrutinised study of travellers experience they endured on voyages by the Caucasus in deep connection with the political course on “pacifying” the region, proclaimed by the Imperial authorities. Racy images of the Cossacks, Russian settlers, native peoples and “unpacified” highlanders were performed in order to legislate the Imperial annexation of lands and their acquisition by Russian civilisation.*

*Together with the motives of showing huge contrast between the pastoral life of Russian peasants and towns dwellers with the backwardness of the natives, matched the common ideas of European colonialism, the authors show public awareness of the “unpacified” highlanders expressed by the travellers in the image of “a Circassian”. We traced features of Russian literature Romanticism in the travellers depiction of a Highlander as a “noble savage” did for a living by robs and plunders.*

*The authors came to the conclusions that images, elaborated by Russian travellers and righters were utter vivid and influenced on the perception of the region by Russian layman until the early XX c.*

**Key words:** *North Caucasus; Caucasus War; travelogues; Orientalism; Romanticism; people of the North Caucasus; textual visualisation; ideological dogmas and cliché; Cossacks; Highlanders (mountaineers); Russian settlers.*

In early XIX c. the Russian Imperial boundaries were pushed far from Russia mainland to the South-East and reached the foothills of the Caucasus mountain range. The exotic region attracted military and civil Officials, the Adventurers and laymen eager to find cure from a disease in the Caucasus Mineral Water spa resorts. A lot of people had some notes about the experience they gained while travelling Southwards. By the estimate of Ch. King (2008, p. 122.) there were no less than 78 different Russian notes about the Caucasus region to appear only in 30-th decades of XIX c. Not all of them were published immediately due to severe Russian census restrictions extended on every issue of actual military activity. The papers bide their time in families' archives till the end of the Caucasus War.

The issue of the Caucasus visualisation in Russia and Europe by the contemporaries is the plot of a lot of scientific research. Historiography of early XXI c. contains a lot of studies of verbal visualising of the Caucasus borderland for Russian and European auditory in XIX c. (Захаров, В.А., 2006.; Саблин, Д.В., 2006.; Ткаченко, Д.С. 2010.; Дудаев, Д.С., Дудаев, С.Л., 2017.; Sherry, Dana., 2002.) Historians start taking into consideration Edward Said's assumption of deep connection between reconstruction of East cultures in the imagination of Western authors with Imperialism, and his attempts to question the possibility of making correct assessment of the East by the colonial authors. In this paradigm the Orientalism looks no more than a "colonial discourse" a set of images elaborated by the colonisers about people they claim to colonise.

The descriptions of Caucasus published in Imperial Russia were surely performed in the shade of Orientalism. Focused on imposing or creating "some form of order and meaning out of the confusing chaos they perceived in other land" (Jersild, A., 2002, p.5.) they were utter convenient for the Imperial authorities. From the political point the descriptions gave a clear focus in further expansion declaring the mission to civilize the frontier people and connect this mission with the historical role of Russia in the World.

Current article matches the analysis of different "travel notes" performed during the voyages to the Caucasus in 20-30 decades of XIX c. when military confrontation with the highlanders (Caucasus mountaineers) start turning into the full-scale conflict. Based on the vague Orientalism and Imperial ideology studies we will focus on Russian materials matched the issues of the Caucasus visualisation by the contemporaries and the participants of the Caucasus War. The study of images set they

elaborated together with the attempts to clarify the reliability of the images the travellers used to describe the Caucasus life and cultures in XIX c. gives the opportunity to generalise the global issue of studying the public awareness of the Russian Orientalism. It influenced in its turn on the image of Russian South frontier spread in laymen imagination either in the country or beyond its European boundaries for quite a long time.

Within the poor number of the Caucasus notes actually published in Russia in 1820–1830, two travelogues of I.T. Radojitsky and V.B. Bronevsky stood out of the common level. Compared with other travellers notes they overgrew the jots on pure technical information about the condition of the road itself or the places of rest for a traveller, and made a reader acquainted with the region, its nature and inhabitancies. They both offered valuable information about newly possessed Imperial region that remained still unknown for the majority of the educated Russians.

*Ilya Timofeevich Radojitsky* was an old military serviceman. Being a participant of the Patriotic War of 1812 he in the rank of a Colonel was allocated to the troops of the Caucasus Corpus under the commandment of the General Yermolov in 1823. The route laid from Central Russia to the Staff of the Caucasus Line Commander in the town of Georgievsk where he arrived to take part in the military activity in the nearby Kabarda. Radojitsky cooperated with Russian journal “*Otechestvennye Zapiski*” (The Notes about Our Homeland) where he published the travelogue “The Way from the River of Don to Georgievsk”.

Another, a civil traveller by the Caucasus was *Vladimir Bogdanovich Bronevsky* – a military writer and historian. He was the author of the solid “History of the Don Cossacks” together with some autobiographical descriptions of the Russian fleet activity near the Greece in 1826-1828. His racy travelogue “The Caucasus Travel” published as an additional volume to the historical work about the Cossacks can be taken as an interesting primary source showing the process of a Central Russia dweller revealing the exotic region with unfamiliar people and ways of doing things.

The two travellers came to the Caucasus had different concerns in the region. While Radojitsky was changing the place of his military service, Bronevsky as a retired civil official drove to the Caucasus mineral springs in order to get a release of his disease. But their motives for making the travel notes were the same – they were driven by the idea to enlighten a reader in the region natural richness (like mineral water in a spa resort) and alert a potential traveller about all the dangers by the road.

Any traveller traipsing his way through the monotonous steppe zone of South Russia contemplated on the character of the Russian colonisation. He took a notice about the way of economic activity of the Don Cossacks together with Russian settlers relocated by the Government into the vast open space of the Caucasus district South borderland. The authors saw all the processes in the steppe from the point of a permanent colonisation and connected it with poor image of every detail of the Cossacks farming household.

With strong sense of irony Bronevsky describes villages (*stanitsy*) of the Don Cossacks laid at the edge of the Caucasus district. Even the Cossacks capital – the town of Novochechensk appeared to him as “something with good starting point mixed with the incline to be never seen to the bitter end.” He described a typical shanty town full of sacks and half-constructed public buildings; loads of raw material piled up in order to run renovation but left alone with no use and thus get spoiled; fences of some private houses fallen down on the central avenue and turn into an obstacle for any passer-by. The excuse for poor attention to the homeland common welfare Bronevsky traces from the very core of the Cossacks military service. As the main force for military colonisation the Cossacks are obliged to move together with the frontier, thus being accustomed to relocate they didn’t take the current place as the constant one.

In contrary, rich Russian peasants’ villages in the North part of the Caucasus district stroke a traveller with their worth. The colonists relocated here from Central Russian Orel, Tula and Kursk gubernias were free from the military duty and had a lot of time and force to develop their settlements. The villages stretched by the steppe expanse for more than 200 *versts* (133 miles) in the words of Radojitsky (1823, p. 356.) were all in “attracting eye condition” populated with ordinary peasants “who live well, maybe even better than they used to in their historical Motherland.”

Ten years later, Bronevsky eyewitness the same signs of Russian peasants’ general well-being. He described villages with wide regular streets, net houses, gardens and orchards enclosed by fence. Every village had its own Church, cemetery and sometimes even a fish-pond. (*Бронеvский, В., 1834, p.18.*) Pastoral life in a steppe converted into a typical agricultural region looked the best evidence about good things Russian civilisation brought into former wild lands of Ciscaucasia in the eyes of the traveller.

The stance of travellers matches well-known point of the early European colonialism focused on the idea that local people were unable to

develop the land they lived for centuries, the natural riches laid in vain before the Europeans explored and founded better use for it. (*Terry Deary, 2002., p. 11.*) Thus, vivid descriptions of the colonists' prosperity legitimised the annexation of new lands in the South and their economic acquisition.

Newly founded towns laid in the way of a traveller, added even more solidity to the point and were crying about success of the colonisation project. There were Stavropol, Alexandrovsk, Georgievsk and Pyatyorsk laid by the route Southwards. Being set up in the late XVIII c. as the forts of a fortified line from Azov to Mozdok, they turned into main towns of the Caucasus district by the second decade of XIX c. The towns were surely smaller than the old historical ones in the Central Russia, were far from the stunning Imperial capital of St. Petersburg, but could offer the sense of huge success of the Empire in urbanisation of its south limits and turning the wild frontier into a developed borderland.

In the notes of Radojitsky he emphasised Stavropol as the town with convenient location, standing out of other centres for crystal-clear drinking water and healthy climate. Perhaps, the author knew about the military authorities conceived plot for changing the official centre of the District administration to Stavropol and tried to explain it in this way. (*Радожницкий, И.Т., 1823, pp. 358-359.*)

The natives lived near Russian villages and towns in the steppe zone of the Caucasus gave a massive contrast with settlers. Radojitsky noted his desire to watch the nomadic Kalmyks on his way, but had no opportunity to satisfy the curiosity seeing only a dozen of homemade tents (*kibitkas*) and high wheel wagons with no local people around. (*Радожницкий, И.Т., 1823, p. 353.*) He was unlucky with the season of the travel: the nomadic people were grazing their cattle in another tract of land and used to come near the Russian communication road by winter.

The local Kalmyks were seen by Bronevsky who associated the Ciscaucasia vast steppe expenses with a boundary of Europe and Asia. In his mind they had deep connections with ancient people known from Greek and Roman authors together with the Ancient Russ and European Chronicles. "While the Russian journey to the imperial frontier, as was common to Europeans in the colonial context, was not just a movement through space but also backward in time", as A. Jersild (*2002, p. 9.*) had put it. The appearance of native Kalmyks in the eyes of Bronevsky (*1834, p. 13.*) looked like a huge resemblance with people participated in the Distribution of Races of IV – VII cc. "My scared imagination referred to the portrait of the horrible Attila the Hun one can easily recognise in a

face of any Kalmyk belonged to the same race, courage and ugly appearance”.

Generalising notes of Russian travellers, we conclude that the image of steppes with the native inhabitants halted any evolution was typical within the Orientalist tradition. The image of backward East was solid and not controversial even in the shade of descriptions of the utter inconvenience of Russian post stations erected by the communication route to South. Stations in Kalyninskaya, Mechetenskaya, Yagorlikskaya and many others were celebrated in Bronevsky's notes with notions that rare official looking after a station was trying not to scam at his expense: to overcalculate a traveller in payments or counting “distances”, to swap him less horses or fiddle additional money at every convenience. Some even tried to show him the wrong bypass in order to skimp on horses' efforts.

But gorgeous landscape sightseeing more than made up for all the inconveniences. Rare traveller was not exited with the scenery of the Caucasus mountains range, and some like Radojitsky who could enjoy the mountains only in a half way distance between Stavropol and Georgievsk, were eagerly waiting for the scene. He described the feelings when understood that the grey-white line in the horizon looked like clouds, were the “snow-covered cliffs and hills, pushed one upon another or rising high upward contributing to shaping the whole into an endless line of the mountain range.” (*Радожницкий, И.Т., 1823, p. 361.*) Between other cliffs and mountains, one could easily clarify a huge two-peaks snow covered formation “the Giant on the Earth, the Persian Shutt-Mountain by name, better known us as Elbrus.” (*Радожницкий, И.Т., 1823, p. 361.*)

In his turn, Bronevsky describes the Pyatygorsk mountains seen with the Great Caucasus range at the background. Separate mountains covered with forest and standing alone on the plain open space of a steppe made nice contrast with snow-white peaks of Elbrus. In the words of the author, they gave an “unusual picturesque site that catch an eye with its full awesome, though the rational mind can hardly believe in actual existence of so high formation.” (*Броневский, В., 1834, p.26.*)

Russian travelogues give good point to clarify the idea put up by some modern Western investigators about the existence of some “dual vision” of the Caucasus. In a traveller imagination both romance and horror were blended together in “indelible memories.” (*King, 2008, p.77*) The excitement about “unspeakable beauty” of the Caucasus mountains



coexisted with deep horror of a perspective to be captured by their wild inhabitants.

In the words of Radojitsky, being impressed with Elbrus scenery he made up his mind to have a sketch of it and depicted the landscape beauty together with some personal scares. On his picture the two-peaked mountain raised upward over the gorges where in the blue mist “the robbers were lurking.” In front of Elbrus the artist showed Zmeinaya mountain with the river of Kuma run through its foothills. By the river bend half-covered in deep bushes one could see “a fancy for his pray wild Khabardian” dashing his way toward the road. The sensation of unrest was deepening by the image of a group of Cossacks guard standing on a hill by the road in order to watch the vicinity. (*Радожницкий, И.Т., 1823, p. 364.*) Radojitsky’s outlook on the horrors of frontier routine had huge base.

The way of a traveller in the Caucasus uplands was possible only under the cover of a Cossacks guard. Some travellers said that although the tales one could hear in every post-station about the Highlanders robbing and plundering were exaggerated in the Don region, they obtained the plot on coming closer to Terek, Kuban or Malka rivers. (*Торнау, Ф. Ф. 1835, 2002, pp.153-154.*) The travelogues stressed military precautions took place in Southern parts of the Caucasus district. Radojitsky points on the fact that in the span of 79 *versts* (53 miles) from Alexandrovsk to Georgievsk he could see plenty Cossacks watch-groups (*pickets*) “inclined to protect a traveller off a plunder raid from the side of the Caucasus mountains.” (*Радожницкий, И.Т., 1823, p. 360*) Transports took their way convoyed by guard in daytime, and at night when any movement were forbidden used to stay in a nearest village or station. (*Радожницкий, И.Т., 1823, p. 360*)

Besides couriers carrying emergent official papers nobody could leave a village earlier than 10 a.m., even peasants start their agricultural works at this time – Bronevsky continues the idea of his predecessor 10 years later. “In addition to a military post placed half a way from one point to another one can see two or three Cossacks on watch in a distance of 3-4 *versts* on the road. The danger is high, I presume” (*Броневский, В., 1834, p.23.*) – wrote the author when drove near Alexandrovsk.

The rumours about attacks on transport, plundered villages, robbed travellers and killed Cossacks circled in the points of the Defence Line and fostered into a traveller’s frightened mind the idea about ubiquitous highlander-robbers, “predators” in official Imperial term. In the words of Bronevsky, “a predator snuggling to the neck of a wild horse can charge

the victim like an arrow, or disappear off the vision in a flash just to appear again in the sector he is expected less of all; or he can stalk a prey moving by a transport in the distance out rifle shoot range waiting for the earliest convenience to attack.” (*Броневский, В., 1834, p.25.*)

Bronevsky vividly tells about personal scares the civil traveller experienced on the way to Mineralnye Vody spa resort. He had poor believe in the determination of the Cossacks guard to protect him against real danger, so he armed the servants the best way he could. “One was carrying a training gun for children, the other was armed with an old rusty Dragoons sabre, while the coachman was given a pistol that was not in use since the last war of 1827. Our old nanny turned grey with fear looked into one window of the coach then into another, howling: she saw a Circassian in every tree or a bush.” (*Броневский, В., 1834, pp.28-29.*)

The controversial image of a Highlander occupies a noticeable position in travelogues. Following the official classification of local people based on their loyalty to Imperial Government on the “pacified” and “unpacified” ones, Radojitsky labels the former as “the Tatars”. He observed a group of them in Georgievsk where “the Tatars” came from their upland villages (*auls*) for buying a commodity in the local market.

In the terms of Radojitsky (*1823, p.368.*) they were “the pacified savages” who “on having no decent dress” had to walk untidy. They had generally slummy impression with dull, sun tint faces, duty furry hats, grey coats with gun cartridges attached to a chest, girdled by belts with curled-blade swords and daggers. Only the Mullah who led the group had slightly better appearance with his “white turban, green kaftan and long brass inkwell fixed at the belt instead of a dagger. The Mullah was carrying a pile of official papers hinted his role of a priest, judge, notary and clerk all together.” (*Радожницкий, И.Т., 1823, p. 369*) In the eyes of a European-minded traveller the description of the “pacified” mountaineers was an example of the backward East colluded with modern civilisation.

Radojitsky either saw no value in any branch of local culture. He described “a Tatar dance” seen with not a shred of understanding. To his point it was no more than harsh sounds of a pipe accompanied by high-pitched shrieks “*hai-da*”. A dancer distorts the very meaning of a dance rising from side to side, bent down in an attempt to turn his own feet inward and step on toes. “The quicker one managed to twist his feet, the better this dance looked to the natives.” (*Радожницкий, И.Т., 1823, pp.369-370*) The dance latter inspired Russian composer Glinka to adopt it to his famous performance, in the eyes of Radojitsky was the best evidence of the native Caucasians savagery.

Radojitsky (1823, 368) headlined that the “pacified” Highlanders had the same military service with the Cossacks. They participate in transport convoy together with the expeditions against the “unpacified highland bandits”. His notes tell some details about economic and social life of the natives. But the core point sounds quite Orientalist. The Author headlines that “the Tatars are very unhappy with our Militaries’ rifles and bayonets. Not long ago they used to practice robs of travellers at night or sometimes in daytime; but when the Cossacks posts were installed by the roads they had to tame and obey, calmed down the way that the country became much safer.” (*Радожницкий, И.Т., 1823, p.368*)

In contrary, the “unpacified” Highlanders were taken by travellers not as dull backward people, but more as racy “noble savages”. Being far from any accurate ethnic identification they used to label people with a generalised term “the Circassians”. The term was used even by Russian traveller Ilya Berezin (1850, p.58) in his ethnography trip to Dagestan – the region with no actual ethnic Circassians – the Adyga-speaking native people at all. The most interesting explanation of the term gave a German traveller Moritz Wagner (1856, p. 9) who thought it be “a term of Turkish origin, unknown to the inhabitants themselves. The word means highwayman, or robber.” Thus, from the point of Orientalism deep connection of Highlanders with doing for a living by stopping people travelling on public roads to stole from them was out of the question.

Bronevsky (1834, p.23) depicts a Circassian as a person mounted on a beautiful horse “as quick as a lightning”. Dressed in shining chain mail he can shoot strait either from a rifle or a pistol while from a horseback; a sword in his hand can do unimageable things. In the words of Bronevsky (1834, p.23-24.), the Circassians gained their outstanding military skills via performing endless plunder raids that were the only way for a savage of doing for a living. They were proud with their business, saying they went on a public road “either to benefit from a traveller or ‘pomolodchestvovat’ - to show off.”

Bronevsky point had strong resemblance with the outlook of the literature of Romanticism widely spread in early XIX c. in Russia. Applied to the ethnic realities of the Caucasus it turned into fascination of the Circassians – “half-heroes and half-thieves” – in the words of Bronevsky (1834, p.81.), deeply impressed with outfit, bravery and proud behaviour of noble savages.

But his knowledge about the Circassians were not deep enough and generally matched Orientalism. He mentioned that customs, believes, traditions and all way of doing things of the Circassians looked like “a

total chaos” unintelligible for a European. That’s why we “can only love but not respect” a savage. (*Броневский, В., 1834, p.81*) The Author understood his role not in making a close approach to studying the Highlanders but in enlightening Russian reading auditory on things he knew about the restless and wild mountain dwellers.

The Circassians looked to Bronevsky as a typical primitive people with all their pros and contras – full of contradicting virtues and vices. In a long list the author opposed advantages and disadvantages of the noble savages. They were greedy, but undemanding in everyday life; insidious, but faithful and loyal as friends; spiteful, but hospitable to visitors; live in freedom, but tolerate the institution of slavery; credulous, but respectful to elders. “These character traits are the essence of bitter blend that had not evaluated and was unable to be improved within ten centuries time span” – concludes Bronevsky (*1834, p. 83.*) saying about the typical Oriental stagnation of local people in the Mountain frontier region.

To his point the Circassians mired in prehistorical original conditions for centuries being busy with rob, murder and rivalry feud activity. Endure the situation of “endless war alert and misery” living off the influence of the civilised World, they had no opportunity to develop in their character anything but valour, prompt in dealing with an enemy and all other things, generalised by Russians in the term of a “predator”. “One can hardly found any other nation in the World so determinate to defend its own freedom together with seize the freedom of a neighbour.” (*Броневский, В., 1834, pp.83-84.*)

Radojitsky was either influenced by the Romanticism that looked natural in the shade of his activity as a writer of novels and poetic stories he used to make an additional benefit from. His novels show the full set of usual romantic stereotypes and contradict the early statements about the “Tatars” one could see in the travelogue. In the novel “*Khiz-Burun*”, for example, he retells in the Romantic manner the Highlanders’ legend about the origin of the name “*Khiz-Burun*” (A Girl Hill) given to an upland on the right bank of the river of Baksan in Kabarda. The legend in fascinating Radojitsky’s interpretation tells about the Mountaineer beauty Zulma killed innocently by her jealous husband (some sort of a Highlander Othello). Due to stories written in the manner highly correlated with the Caucasus poems of Pushkin and Lermontov, the Romantic outlook on the region inhabited by noble savages was promoting in Russian reading society.

To sum up impressions the travellers experienced in the Caucasus, it is safe to say that any European-minded person thought “he was mov-

ing toward the frontier between two worlds. Behind him lay the Russian Empire, ... now reaching out to tame and cultivate the peoples from the Black Sea to the Caspian and beyond. Before him stretched the unexplored vastness, populated by primitive highlanders whose depredations were already widely known in Europe: women sold into bondage by Tatar slavers; travellers held for ransom; bandits lying in wait in craggy defiles; rival clans waging ancient blood feuds, now prosecuted with the modern musket." (*King, 2008, p. 5*) In the context of this outlook the natives were unlikely to perform any positive job besides blood feuds, plunder raids and robs at public roads.

We can either see how the generalised notions of the East influenced on the way the authors offer to solve so-called "Caucasus question". Neither Radojitsky, nor Bronevsky so any alternative to the extension of Russian civilisation on every group of the Caucasus dwellers. Thus, their stories about the "wild highlanders" that had nothing but a character of a "predator" in possession, legislated the highhanded ways of the "pacification" and applying force in the region by the Empire.

As a military official Radojitsky (*1823, pp. 374-375.*) suggested a compulsion be good way to convert "a highwayman into a useful person". He welcomed the practice of erasing forts and fortifications in the Caucasus foothills in order to "lock" the passages for the robbers "nesting" in their mountain dens. "Being blocked within their inconvenient limits, with no opportunity to benefit from plunders they would have no other option but to relocate to valleys for peacefull life." Radojitsky thought highly of the plan. He emphasises that a lot of the Kabardian families "forced off the gorges" founded new villages on nearby plains learning "how to endure new life of peace." (*Радожницкий, И.Т., 1823, p.375.*) To the point of the author it looked as the most humane practice for "converting mischievous rogues into useful people without slain of human beings." (*Радожницкий, И.Т., 1823, p.375.*)

The notes of travellers can be taken as an evidence of Russian colonisation of the region. They show the growing interest of Russian society to the colonisation that can be now traced not only as economic but either as an intellectual acquisition of newly obtained territories. In this context the travelogues of Radojitsky and Bronevsky became part of the increasing stream of literature that in 20-30 decades of XIX c. splashed on pages of Russian journals. The travelogues written in lively manner full of picturesque images were of an utter cognitive value. The Authors showed to reading auditory previously unknown racy world and could be taken as early promoters of the idea of Caucasus in Russia and abroad.

Their literature experience proves that textual visualisation of the Caucasus lands sounded like a blend of ideas of European Orientalism with Russian Romanticism. It had far-going consequences for perception of the Caucasus world, and one can easily trace the same ideological cliché and prejudices in further literature until the early XX c.

In meantime for Russian reading auditory the romantic perception of the Caucasus turned the region from the place of exile in “the Warm Siberia” into the country perfectly fit for all who see for his personal adventure or for a plot of explorations. “A place for contemplation of a philosopher; a plot for studying Natural History, Geography or History; the place of an artist attraction with captivating Caucasus landscapes!” – exclaimed Radojitsky (1823, p. 365) in order to make a list of the region wonders for the further Caucasus explorers. But he personally was unable to offer any scientific approach to the activities he mentioned above and concentrated on the pure visualisation of the region in the form of churning up images for romantic literature.

The activity in visualisation of the Caucasus from the point of Orientalism performed by Russian writers and travellers was not an evidence that the local people had no culture traditions at all. They cannot be taken either as a solid description of the actual region’s ways. As V.I. Istomin – a Russian naval officer sent to the Caucasus in the late 1840-th had put it, “everything we were initially told in the Central Russia about the Caucasus – the new Eldorado region of our flourish state – is in fact nothing but an utter lie. I cannot find out the source of the tales about prosperity and immense reaches, for everything I’ve eyewitness over here for three months looked completely vice-versa.” (*ОИИ PHB [Manuscripts Department of Russian National Library], St. Petersburg. Ф. 417, Он.1, д.4. л.4 об.*) When it’s military success, Russia came in touch with the natives closer and closer, the demand of extending scientific knowledge together with revision of romantic outlook became more and more obvious.

### **Bibliography:**

**Jersild, A.**, 2002. *Orientalism and Empire. North Caucasus Mountain Peoples and the Georgian Frontier, 1845– 1917.* London.

**King, Ch.**, 2008. *The Ghost of Freedom. A History of the Caucasus.* Oxford.

**Sherry, Dana.**, 2002. *Kavkaztsy: Images of Caucaus and Politics of Empire in the Memoirs of the Caucasus Corps' Officers, 1834-1859.* *AB IMPERIO*, 2, pp. 191-223.

**Terry, Deary.**, 2002. *The Barmy British Empire.* Haydock.

**Wagner, M.**, 1856. *Travels in Persia, Georgia and Koordistan.* London.

**Березин, И.** 1850. *Путешествие по Дагестану и Закавказью.* [Berezin, I. *Puteshestvie po Dagestanu i Zakavkaz'ju*]. Казань.

**Броневский, В.**, 1834. *Поездка на Кавказ.* [Bronevskij, V. *Poezdka na Kavkaz*]. СПб.

**Дударев, Д. С., Дударев, С. Л.**, 2017. *Северный Кавказ глазами представителей российского общества первой половины – середины XIX века* [Dudarev, D.S., Dudarev, S.L. *Severnyj Kavkaz glazami predstavitelej rossijskogo obshhestva pervoj poloviny – serediny XIX veka*]. Армавир; Ставрополь, 2017.

**Захаров, В. А.**, 2006. *Образы Кавказа в русском общественно-политическом сознании XIX – начала XX вв.* [Zaharov, V.A. *Obrazy Kavkaza v russkom obshhestvenno-politicheskom soznanii XIX – nachala XX vv*]. *Кавказский сборник. Т. 3 (35) / под ред. В.В. Дегоева.* М., pp. 218–228.

**ОПИ РНБ** [Manuscripts Department of Russian National Library], St. Petersburg. Ф. 417, Оп.1, д.4.

**Радожицкий, И. Т.**, 1823. *Дорога от реки Дона до Георгиевска на пространстве 500 верст* [Radozhickij, I.T. *Doroga ot reki Dona do Georgievsk na prostranstve 500 verst*]. *Отечественные записки. Ч. 15. № 41*, pp. 343–375.

**Саблин, Д. В.**, 2006. *В плену иллюзий: образы Кавказа и горцев в русском общественном сознании XIX в.* [Sablin, D.V. *V plenu illuzij: obrazy Kavkaza i gorcev v russkom obshhestvennom soznanii XIX v.*]. *Военно-историческая антропология. Ежегодник, 2005/2006. Актуальные проблемы изучения.* М., pp. 53–72.

**Ткаченко, Д. С.** 2010. *Эволюция образа горских народов в России в период Кавказской войны XIX века* [Tkachenko, D.S. *Jevoljucija obraza gorskih narodov v Rossii v period Kavkazskoj vojny XIX veka*]. *Известия Высших учебных заведений. Северо-Кавказский регион. № 6*, pp. 59–63.

**Торнау, Ф. Ф.** 1835, 2002. *Воспоминания русского офицера* [Tornau, F. F. *Vospominanija russkogo oficera*]. Москва.

---

\* The reported study was funded by RFBR according to the research project № 19-09-00037 «Military investigators of the Caucasus in Russian Empire: historical biographies, ways of the investigations and scientifically heritage»

*Зейнеп Зафер*  
*Анкарски университет (Турция)*

*Zeynep Zafer*  
*Ankara University (Turkey)*  
*[zzafer@ankara.edu.tr]*

## **Турският печат за нагласите сред турците в България и тоталитарната изселническа политика (1968 – 1969)**

**Abstract:** *The flow of refugees and displaced people from the present territories of Bulgaria to the Ottoman Empire and Turkish Republic continued more than a century. In the scientific researches the refugee problem usually is considered from the political and historic point of view, the authors basing their studies mainly on official documents, treaties and bilateral agreements, protocols and reports preserved in different archives, in which personal experiences and human stories are lacking. The memories and the impressions of victims and witnesses shared in memoirs and in the press present the most vivid, intimate and realistic human stories.*

*Some of the popular newspapers published testimonies and papers of the eviction from 1969 - 1978 which took place in the frame of a bilateral agreement. Three series of reportages published from the beginning of 1968 to the end of 1969 testified about the realistic attitudes of the Turkish minority, the personal drama of some of its representatives (leaving or staying in the totalitarian state) in the stormiest and full of tension years of negotiation, signing and starting the limited emigration. The aim of this research is to present the public discourse in Turkey about this exodus which have not found proper place in the researches.*

**Key words:** *Turkish press; deportation; ethnic cleansing; policy; Turkish population.*

Изселванията на турци през 1950–1951 г. и 1969–1978 г. показват, че правителствата в комунистическа България създават напрежение и изселническа психоза, като упражняват срещу турци и мюсюлмани дискриминация и силен натиск под формата на репресии, ограничения на гражданските им и религиозни свободи. Истинските причини за изселническите настроения не се отчитат от голям брой



съвременни български изследователи, тъй като не познават изследванията на турски език, турската преса и други свидетелства. В тях не присъства и устната история.

Другата, вътрешна, човешка гледна точка за причините, предисторията и стартирането на изселването от 1969–1978 г. се съдържат в преживяванията, в семейните и личните истории, които не са изследвани. Искрената изповед на обикновени хора за комунистическата диктатура, далеч от преднамереността и пропагандата, не може да се намери в цензурираните български вестници и списания от този период. Тя отчасти намира място в свободния турски периодичен печат, в някои писма и мемоари. Настоящото изследване в голямата си част се основава на действителни човешки истории, отразени в репортажите на трима турски журналисти. То има за цел да представи причините за “доброволното” изселване, неговото организиране и подготвяне от тоталитарната власт.

### Депортацията от 1950–1951

Ибрахим Ялъмов е историкът, който много рано обръща внимание на характера на изселническа политика на българските комунистически власти: “Тоталитарният режим не е чужд на идеята за етническо прочистване. Затова той нееднократно се връща към изселническия въпрос” (Ялъмов 2002: 347). Първото етническо прочистване<sup>1</sup> на комунистите спрямо турците се реализира за много кратък срок през 1950–1951 година чрез депортирането на 154393 души (37351 семейства) (Şimşir 1986: 227). Подготовката за тази насилствена акция започва много по-рано, което се потвърждава от изказванията на Г. Димитров през 1945 г. (Баева, Калинова 2009: 46), 1947 г. (Кълъч 2020: 236) и 1948 г. (Баева, Калинова 2009: 48), от доклада на Д. Терпешев от юни 1948 г.<sup>2</sup>, от двете решения на Политбюро на ЦК на БКП през юли и август 1949 г., от думите на Сталин при срещата му с Г. Дамянов, А. Югов и В. Червенков през юли 1949 г. (Ялъмов 2002: 307). Комунистическите власти в периода 1947–1949 година ограничават изселването, което обхваща малък брой хора, но в края на 1949 г. становището на правителството по

<sup>1</sup> Второ етническо прочистване се извършва през 1989 г.

<sup>2</sup> Терпешев пише, че всички турци и помаци от Източните Родопи, включително и партийците, са подали молби за изселване. За положението в района вж.: ЦДА, ф.1Б, оп. 6, а.е. 637, л. 17–26.

този въпрос рязко се променя. От месец септември започват да се издават много повече паспорти на желаещите да заминат.<sup>3</sup>

В края на декември 1949 г. българското министерство на външните работи е натоварено да принуди Турция да приеме в срок от 3 месеца 250 хиляди турци от южните райони на страната (Баева, Калинова 2013: 248), което преднамерено е названо “изселване” на желаещите да заминат. Предвиденият 3-месечен срок, за който тоталитарната власт иска да изгони стотици хиляди свои граждани, е най-голямото доказателство, че не става въпрос за доброволно изселване, а за депортация. Намеренията за етническо прочистване са формулирани много ясно в Решение No 270 на Политбюро на ЦК на БКП, в което се препоръчва “да се поощрява с всички средства изселването в Турция на турско население, и преди всичко от родопските гранични райони”, а останалите турци в пограничните райони да се заселят принудително в Северна България (Ялъмов 2002: 308). Не може да се говори за “доброволно” изселване, когато на много турци, задържани и измъчвани в милицията, е наредено в срок от 48 часа (Şimşir 1986: 223; Gökatalay 2021: 4) или в най-добрия случай за петнайсет дни (Кълъч 2020: 75, 360, 384, 481) да напуснат страната. От проведена анкета сред депортираните в Турция става ясно, че 74 % от пълнолетните мъже са подложени на репресии, спрямо тях е било приложено беззаконие или насилие от страна на държавата или граждани от български произход (Şimşir 1986: 229)<sup>4</sup>.

Първата дипломатическа нота на България от 10 август 1950 г. е връчена само две седмици след решението на турското правителство да изпрати войска срещу комунистическите сили в Корея (Gökatalay 2021: 2), а втората – на 22 септември 1950 г., което съвсем не е случайно. Накрая Турция е принудена да отвори границата си. Опитите за вкарване на хора без визи, с фалшиви визи или на роми принуждават Турция на 7 октомври 1950 г. да спре приемането на депортираните, но на 2 декември тя отваря границата си отново, за да я затвори повторно на 8 ноември 1951 г. поради изложените вече причини и други своеволия на българските власти и държавни служители. От месец юни до октомври 1951 г. Турция изпраща 6 протестни ноти до правителството на В. Червенков, които не дават

<sup>3</sup> Според Билял Шимшир през 1947 г. изселниците са 1763, 1948 г. – 1514, а 1949 г. – 1670 души, до месец август 1950 г. са издадени изселнически визи на 26788 души (Şimşir 1986: 217–218).

<sup>4</sup> Анкетата съдържа и информация за частната собственост на депортираните.

резултат. Българската страна хвърля цялата вина върху Турция и отказва да пусне останалите на границата 1500 заминаващи, въпреки че не става въпрос за окончателно затваряне на границата, а за контролирано преминаване. След като окончателно се убеждава, че депортацията е спряна, българската страна на 30 ноември 1951 г. обявява, че прекратява “изселването”, а след това отнема паспортите на всички турци, готови да тръгнат (Şimşir 1986: 224–228).

### Изселването през 1969–1978 г.<sup>5</sup>

Насилственото изселване през 1950–1951, което в пълния смисъл на думата е етническо прочистване, и изселването между 1969–1978 година, основаващо се на двустранно споразумение, са тясно свързани помежду си, защото второто е резултат от първата депортация на стотици хиляди турци, причинила разделянето на съпрузи, на малолетни деца<sup>6</sup>. Турските дипломати многократно представят пред българските власти искания за уреждане на проблема с разделените семейства (Баева, Калинова 2013: 252). През 1953–1955 г. Турция осем пъти отправя дипломатически ноти към българското външно министерство по въпроса и прилага списъци на близки роднини с общо 2176 души. Следващата година броят им нараства на 2347 (Калинова 2016: 366), но тоталитарният режим остава глух към настоятелните предложения. През декември 1955 г. СССР се намесва и иска българските власти да разрешат на хората от представените списъци да се съберат с близките си.

Закриването на турските училища през 1958–1959 г. и ограниченията върху религията, принуждаването на населението да отглежда свине (Şimşir 1986: 277)<sup>7</sup>, намаляването на броя на мюфтийствата в страната, кооперирането на земята и др. създават сред хората чувство за страх и несигурност. Смяната на имената на ромите и помаците през 1960-те години също сериозно тревожи и безпокои турците. Заплашителните думи на Т. Живков към турците създават напрежение: “Обаче след това (...) няма повече да се занимаваме с

<sup>5</sup> Извършва се в рамките на двустранната *Спогодба между Народна република България и Република Турция за изселване от Народна република България в Република Турция на български граждани от турски произход, чиито близки роднини са се изселили в Турция до 1952 година*. Тя е наричана още *Спогодба за събиране на разделени семейства*.

<sup>6</sup> В споразумението на първо място се споменава за разделени съпрузи.

<sup>7</sup> Тази принуда се извършва през 50-те и 60-те години. За нея свидетелства и Назъм Хикмет: Вж. ЦДА, ф. 214Б, оп.2, а.е. 84, л. 7.

този въпрос, тъй като не можем да се съгласим този въпрос постоянно да трови отношенията между нашите две страни” (Баев, Котев 1994: 50).

Истинските причини за изселническите настроения<sup>8</sup> не се отчитат от голям брой съвременни български изследователи, тъй като не познават изследванията на турски език и турската преса. На базата на български архивни документи се приемат обвиненията на българските тоталитарни правителства срещу Турция, която в действителност никога не е имала интерес да предизвиква изселнически настроения. Затова масовите вълнения и заявленията до турските дипломатически представителства от март 1963 до март 1964 г. се държат в тайна от турската преса (Şimşir 1986: 267–268, 277, 279, 284.). За една година се подават приблизително 400 хиляди заявления за изселване. Само едно от тях, което се съхранява в архива на Министерството на външните работи на Турция, съдържа достатъчни доказателства за репресиите и дискриминацията, чрез които тоталитарното правителство създава обстановка на напрежение, несигурност и изселническа психоза сред турското население:

“(...) През последните години до най-висок предел достигнаха чувствата на силна ненавист и желание за мъст, които българското правителство храни най-вече срещу всичко турско. Ние, турците в България, станахме жертва и прицел на желанието им за отмъщение срещу турците въобще. (...) Българското правителство стигна до там, че посяга на турската ни идентичност...

Закриха турските училища и детски градини. Изгониха от работа турските учители. На останалите е забранено да говорят турски с децата ни. Откриват различни курсове, за да обучават младежта ни в български дух. (...) Постите в месец рамазан, религията и часовете по вероучение отдавна бяха забранени. Под нови имена те си празнуват старите официални дни и празници. А нашите празници са забранени... Посредством радиопредаванията и вестниците хиляди български думи насила се въвеждат в турския ни език. Сюнетьт (...) беше забранен на 30 декември 1959 г. (...) Изтриха думата “турчин” от личните паспорти на татарите, помаците и циганите...

---

<sup>8</sup> На всички свидетели и изследователи на тоталитарния период е известно, че поради терора и произвола на социалистическата диктатура при възможност от родината си биха заминали много етнически българи, тъй като в страната животът става непоносим. Често се правят опити за бягство и много българи са убити на границата.

(...) От 50 хиляди студенти 3200 би трябвало да са турци, а в действителност турците са 20 пъти по-малко. (...) Много специалисти са без работа. За да ни откъснат от нашата майка-родина, твърдят че сме от българско потекло. (...) Назначават някои турци на отговорни постове, използват ги като маша сред турското население. Упражняват натиск върху момичетата ни да се женят за българчета (...)" (Şimşir 1986: 269–270).

След създаването на желаната изселническа психоза, тоталитарното правителство, което години наред отказва да разреши изселването на 2347 души, решава да опита организиране на масово изселване с правителството на младия и неопитен Сюлейман Демирел. Към 1966 г. отношенията между двете страни чувствително се подобряват (същата година дипломатическите представителства в Анкара и София са преобразувани в посолства)<sup>9</sup>, провеждат се двустранни посещения на ниво външни министри (Иван Башев през август 1966 г. осъществява 6-дневно посещение в Турция, а Ихан Чаглаянчил отвръща на визитата с 5-дневно посещение през май 1967 г.). В доклада на И. Башев от 01. 09. 1966 г. до Политбюро на ЦК на БКП за посещението му в Турция се съдържа цялата истина за това колко много българските власти залагат на възможността за нова депортация на турци от страната<sup>10</sup>. В решението на Политбюро на ЦК на БКП от заседанието на 04. 10. 1966 г. се препоръчва своевременно да започнат преговори между специалисти на двете страни "за уточняване на условията /срока и квотите/, **за изселването в Турция на всички турци**, живущи у нас, които доброволно желаят да се изселят, **в това число и близки на изселилите се вече турци**". Както се вижда проблемът за събирането на разделени семейства, което години наред турската страна се опитва да разреши, е изместен на втори план<sup>11</sup>. От своя страна турските власти се опитват да отстояват на българския натиск за масово изселване, от икономически и хуманни съображения полагат усилия да предотвратят без-

<sup>9</sup> С подобряването на отношенията между Турция и България започват гостуванията между роднини от двете страни. Наред с това се поставя началото на вкарването на пропагандна комунистическа и политическа българска литература в Турция. Вж.: **Зафер, З.** "Българската политическа и пропагандна литература в Турция и "В името на народа" на Митка Гръбчева", *LiterNet*, No 1 (230), 13.01.2019.

<sup>10</sup> ЦДА, ф.1Б, оп.6, а.е. 6109, л. 5–15.

<sup>11</sup> Пак там, а.е. 6409, л. 1.

контролното навлизане на хора в страната, което би предизвикало истинска криза.

На 20 март 1968 г. с два самолета Тодор Живков пристига на официално посещение в Турция, за което съобщават всички турски вестници. На 22 март от външните министри на двете страни е подписана *Спогодба за изселване от Народна република България в Република Турция на български граждани от турски произход, чиито близки роднини са се изселили в Турция до 1952 година*, която включва следните категории близки роднини:

- а) съпруг, съпруга;
- б) майка, баща, баба, дядо, прабаба, пращядо;
- в) необвързани с брачна връзка до влизането в сила на настоящата Спогодба сестри и братя и непълнолетни и пълнолетни деца на починали сестри и братя.<sup>12</sup>

Според спогодбата, която поради забавяне от турската страна влиза в сила едва на 19 август 1969 г., от 1 април до 30 ноември седмично трябва да се изселват по 300 души – годишно около 10 хиляди. Изселването фактически започва през 1970 г. (само първата група от 82<sup>13</sup> души пристига с влакова композиция на 8 ноември 1969 г.) и приключва през 1978 г., но протича изключително неравномерно. През 1975 г. заминават само 338 души, тъй като няма много хора, които да отговарят на спогодбата. Турските власти са сигурни, че при съществуващите ограничения, изселването не би обхванало много хора. Но по настояване на българската страна (Баев, Котев 1994: 52), през март 1976 г. се подписва *Протокол за улесняване и ускоряване на изпълнението на спогодбата за изселване от 1968 г.* А през ноември 1977 г. се подписва втори протокол, в който се предвижда изселването да приключи на 30 ноември 1978 г. Отново на власт е правителството на Сюлейман Демирел и по искане на Живковото управление Турция поема задължението да приема по 1300 души седмично. До тази дата са се изселили около 50 хиляди турци (Баев, Котев 1994: 52). По предвидените в спогодбата условия, в продължение на 9 години би следвало да се изселят приблизително 90 хиляди души. С подписване на двата допълнителни протокола се изселват общо 115240 (Ялъмов 2002: 352) турци, което говори за успеха на политиката на българското комунистическо уп-

<sup>12</sup> Държавен вестник, брой 82, 21.10.1969.

<sup>13</sup> Според някои турски източници първата група се състои от 81 души.

равление, поставило си за цел да изпрати колкото се може повече хора.

В тоталитарна България безпроблемно издават международни паспорти само на турците, позволяват да заминат всички, които успеят да си осигурят изселническа виза от дипломатическите представителства. В Турция възникват незаконни канали, които срещу пари уреждат заверяването на покани за “близки роднини” в България. Възрастни жени и мъже, които нямат нищо общо с България, срещу пари декларираат пред нотариус за “свои внуци”. Най-често се използва роднинската връзка “баба” и “дядо”, тъй като много желаещи да се изселят нямат живи баби и дядовци в България. Често заминаващите дават рушвети на местните власти, за да не се дава ход на доносите<sup>14</sup>. Същевременно изселването на помаци, татари и цигани, отговарящи на условията в спогодбата, изобщо не се допуска.

### **Турският периодичен печат свидетелства**

През периода 1968–1969 г. три турски вестника по различно време изпращат свои представители в България, за да проучат нагласите на турското население за изселване, сред които и една журналистка, пряка свидетелка на потеглянето на първата група изселници и на 19-часовото им пътуване от Шумен за Одрин. И тримата са оставили много ценни статии и снимки, които регистрират един съществен момент от нагласите и които не присъстват в официалните български документи и строго цензуриран български печат. В специални рубрики турските вестници отразяват настроенията сред турското население в България и отношението му към изселването в периода от март 1968 г. до 8 октомври 1969 г.

Първият от журналистите, Доган Улуч, кореспондент на в-к *Хюрриет* (*Hürriyet*) в Англия (Uluç 2009: 116–117), през март 1968 г., в навечерието на официалното посещение на Т. Живков в Турция, прекарва 8 дни в България. От 24-ти март, когато преговорите все още продължават, започва да публикува поредицата си от репорта-

---

<sup>14</sup> Лично аз станах свидетелка на заминалите през 1978 г. повече от 10 семейства от с. Фелдфебел Дяново, Толбухинско (днес Добричко), които нямаха дори далечни роднини, но получиха необходимите документи от приятели, депортирани през 50-те години. Такъв е случаят с Хасан Йозкан, който се пресели есента на 1978 г. и днес живее в Ескишехир. Посещава преди това със съпругата си Турция, урежда покани и за своето семейство и семействата на братята си. Не може властите да не са знаели това, защото беше известно на всеки. Такива изселвания има в цяла България.

жи под заглавие “Голямото изселване”, която съдържа пет статии. Споменава за Пловдив, за Кърджали (където остава най-дълго), за хасковско село, което специално не назовава. Отива в Асеновград, Куклен и в някои околни села. Въпреки че не посещава други райони, с наблюдателността и изводите си Доган Улуч изпъква като опитен и смел кореспондент, запознат с условията на живот и ограниченията в тоталитарна България. Неговите критични репортажи за комунистическата диктатура и за един политически процес срещу турци в Кърджали стават причина да бъде обявен неофициално за Персона нон грата, за което той научава след година в Англия, когато му е отказана транзитна виза за България (Uluç 2009: 117).

Кореспондентът на в-к *Йени Газете* (Yeni Gazete) Салих Уйгур посещава България в края на февруари и началото на март 1969 г. Той дава повече информация за времето на престоя си, като точно споменава кои места е посетил. Трябва да е пресякъл границата в Одрин на 26 февруари, защото с влак от Хасково пътува през нощта и сутринта на 27 февруари, на първия ден на Курбан байрам, пристига на русенската гара в 9.30 часа и се настанява в хотел “Балкантурист”. Салих Уйгур остава най-дълго и успява да посети градовете Русе, Силистра, Шумен, Варна, Нови Пазар, Разград, Пазарджик, Стара Загора, Търново, Димитровград, Хасково, Кърджали и доста села из тези райони, повечето от които не назовава или дава съкратено. Навсякъде се представя за турски журналист, не крие причините за посещението си и разговаря с всички турци, които среща. Връща се през Свиленград. На 11 март стартира с поредицата си “Голямото изселване започва. От дунавското крайбрежие към Анадола”, съдържаща 18 статии, които предлагат интересни подробности за нагласите на турците в България една година след подписването на договора за изселване.

В-к *Джумхуриет* (Cumhuriyet) изпраща своята 23-годишна журналистка Шюкран Сонер в България през октомври 1969 г., в навечерието на потеглянето на първата група изселници. Само тя има лични спомени и впечатления от раздялата с родина и бащин дом, тъй като е от Прищина и когато е 10-годишна (1954) се изселва в Турция<sup>15</sup> със семейството си. Посещава градовете София, Пловдив, Кърджали, Асеновград и близките до него села Долни Воден и Горни Воден, Пазарджик, Бургас и Шумен. В най-важния момент се намира в Шумен, за да свидетелства за началото на изселването,

<sup>15</sup> <https://www.kimnereli.net/sukran-soner.html>



товаренето на багажа в едно село, изпращането и покъртителната раздяла на гарата. Тя придружава изселниците в 19-часовото пътуване с влака, който на 7-ми октомври тръгва от Шуменската гара в 19.30 и на 8-ми пристига в Одрин около 15.00 часа. Вълнуващи и прочувствени са описанията на Шюкран Сонер в петте статии на рубриката ѝ “Изселването”, отпечатани в *Джумхуриет* от 11 до 15 октомври 1969 г.

В условията на тоталитарния режим контактите с журналисти и обикновени граждани от капиталистически страни са забранени, за тях хората са обвинявани в шпионаж и осъждани. Въпреки това много турци открито изразяват критиката си срещу системата пред тримата журналисти. От някои репортажи става ясно, че най-силен държавен терор се прилага срещу турците в Кърджалийско и Хасковско. Там хората са под много строг контрол, затова са по-предпазливи. На предложението на кореспондента на в-к *Хюрриет* Доган Улуч да поговорят пред консулството в Пловдив, Шукри Мехмедов от Джебел, когото среща при консула, предпазливо му предлага да посети Кърджали, тъй като откритият му разговорът с кореспондента може да му струва свободата.<sup>16</sup> Служителите в консулството и някои познати го съветват да не отива, но Доган Улуч предварително си е уредил водач и заминава с такси. Там той става свидетел на напрежението и страха в района, предизвикано от държавния терор, който продължава и в навечерието на официалното посещение на Тодор Живков в Турция. Още с пристигането си в града, той изживява първата си голяма изненада. Мехмед, който по препоръка на негов роднина от Истанбул, би трябвало да го очаква в едно кафене недалеч от хотел “България”, предишната нощ е арестуван в дома си и се намира в неизвестност. От други клиенти на заведението разбира, че телефоните се подслушват от тайните служби (Uluç 2009: 111), затова планираната му среща с Мехмед е била известна на ДС.

В същия ден сервитър в ресторанта на хотел “България” на турски му посочва маса в ъгъла, където го чакат млада жена с подутти от плач очи и брадясал млад мъж с дръпнат над лицето каскет. От тях научава за политически съдебен процес, на който са произнесени една смъртна, една доживотна и две 20-годишни присъди<sup>17</sup>. Два-

<sup>16</sup> Uluç, Doğan, “Büyük Göç”, *Hürriyet*, 25.03.1968.

<sup>17</sup> Разказват му за приключилия същия ден политически процес, на който за “шпионаж” са били осъдени четирима турци. Кореспондентът не дава всички

мата непознати не назовават имената си, молят го да забрави за тях, дори при случайна среща да не ги поздравява, предупреждават го да не ходи при бащата на осъдения на смърт, който продавал семки на пазара. Думите им за очакваното изселване отразяват изселническата обстановка, паниката, напрежението и несигурността сред турците в града и района: “Само вие можете да ни спасите. Непрекъснато мислим за Турция. Молим турското правителство да не поставя условия за близки роднински връзки. Всичките ни вземете.”<sup>18</sup>

Някои турци в Кърджали изразяват недоволството си от дискриминацията срещу турското население, като изключение правят само партияците, които всички наричат “червени”. Една продавачка на пазара, след като се убеждава, че наоколо няма кой да я чуе, споделя: “Ние, турците в България, сме от “нищожните” хора. Занимаваме се с най-лошата и непосилна работа, тази, която българите работят само по изключение. (...). Но ако си от “червените”, условията веднага се променят.”<sup>19</sup>

В Южна България хората се оплакват от неофициалната забрана за четене на Корана, разказват за наказания срещу “нарушителите”<sup>20</sup>, за забраната на шалварите, които на някои места се режат от представители на местното управление, за принудителния безплатен или ниско платен женски труд.<sup>21</sup> В Северна и Южна България турците са раздразнени най-много от затварянето на турските училища и ограничаването на часовете по турски език. Някои разказват, че след закриване на турските училища, родителите не искат да изпращат децата си да учат, въпреки че образованието е задължително.<sup>22</sup> Дори представителят на мюсюлманската общност в Русе, Хафъз Ислям Реджебов, бивш мюфтия, който е доволен от

---

имена на осъдените. Според него Мехмед е бил осъден на смърт, на Халил са дали доживотна присъда, а на Халилов и на Шабан по 20 години. С Халил Расим (1943) и Шабан Шефкед Салих (1935–2010), които най-напред са въдворени в концлагера “Белене”, бяхме изселени в близки села в Михайловградско (Монтана) през 1986–1987 г. Вж.: Uluç, *Hürriyet*, 25.03.1968. За живота на Халил Расим, осъден на 20 г. затвор, и за открития процес, на който присъстват много турци, вж.: Отворени досиета – Халил Расим,

[<https://www.youtube.com/watch?v=mCfGsyZ0RRQ>]

<sup>18</sup> Uluç, *Hürriyet*, 25.03.1968.

<sup>19</sup> Uluç, *Hürriyet*, 26.03.1968.

<sup>20</sup> Uygur, Salih, “Büyük Göç Başlıyor. Tuna Boylarından Anadolu’ya”, *Yeni Gazete*, 18.03.1969.

<sup>21</sup> Uygur, *Yeni Gazete*, 19.03.1969; 27.03.1969.

<sup>22</sup> Soner, Şükran, “Göç”, *Cumhuriyet*, 13.10.1969.

живота си и не мисли да се изселва, споменава за намаляване на броя на мюфтийствата от 17 на 6 през 1959 г., за закриването на турските училища, за пропагандните книги срещу Турция и турците, които в момента малко били понамалели, но в часовете по литература продължавало изучаването на поезия с антитурски настроения.<sup>23</sup>

Турците в Североизточна България изпъкват като доверчиви и непредпазливи. Но въпреки това пред журналиста никъде не говорят за политически репресии и процеси, за осъдени турци. Няколко души, сред които и представителят на мюсюлманската общност в Русе, който е държавен служител, споменават пред Салих Уйгур за фашизма и репресиите по време управлението на цар Борис, изтъкват че в началото на комунистическия режим шовинизмът е бил подтиснат, но намекват за възраждането му и връщането на власт на стари фашисти, които торможат турците.<sup>24</sup>

За пропагандата относно българския произход на турците Салих Уйгур научава от учителя по музика, Мехмед Хасанов, в едно делиорманско село<sup>25</sup>. Тази пропаганда се потвърждава и от представителя на мюсюлманската общност в Русе Хафъз Ислям Реджебов, който има брат в Истанбул. Той шокира турския журналист с твърденията си за българския произход на турците, помохамеданчени до известна степен насила от мисионери, наричани “бабалар”. Това се потвърждавало от построените от тях текета – “Демир баба” и “Акязълъ баба”.<sup>26</sup>

На въпроса на Салих Уйгур защо се страхуват да останат в България, Мехмет Селим Хюсеинов разказва, че през управлението на цар Борис са изживели много лоши неща. Сега отново българският шовинизъм се надигал, през 1958–59 г. са закрили напълно турските училища и вече турски език се изучавало по един час седмично.<sup>27</sup> Журналистът отбелязва, че едната джамия в Русе е превърната в жилище, където под наем живеят 10–15 семейства, а предната част на джамията в Силистра служи за магазини, само отзад е оставено малко място за молещите се.<sup>28</sup> Не липсват примери и за държавната политика на дискриминация спрямо турците. Салих Уйгур

<sup>23</sup> Uygur, *Yeni Gazete*, 13.03.1969.

<sup>24</sup> Uygur, *Yeni Gazete*, 13.03.1969; 27.03.1969.

<sup>25</sup> Uygur, *Yeni Gazete*, 12.03.1969; 16.03.1969.

<sup>26</sup> Uygur, *Yeni Gazete*, 14.03.1969.

<sup>27</sup> Uygur, *Yeni Gazete*, 21.03.1969; 27.03.1969.

<sup>28</sup> Uygur, *Yeni Gazete*, 13.03.1969; 16.03.1969.

научава, че малък брой турци учат в Софийския университет, български учители пишат ниски оценки на децата им. Според някои интервюирани при постъпки за работа също се проявява дискриминация. Разказват му, че турците са най-бедната част от населението, заети са с най-черния труд, докато българите могат да учат, на тях се дават най-хубавите и платени работи.<sup>29</sup> На журналиста му прави впечатление окаяното състояние на турските махали в Русе и Силистра, които са далеч от новопостроените модерни центрове и са пред срутване<sup>30</sup>.

### “Червените” турци

Турското население не се оплаква само от българските власти, то е много притеснено и непрекъснато изразява недоволството си от турците-партийци, които нарича “червени”. Една жена, продавачка на пазара в Кърджали, обяснява на журналиста от *Хюрриет* Доган Улуч думата “червени” и характеризира партийците по следния начин: “Такива между нас има много малко. Носят турски имена, повечето говорят като истанбулчани, но са продажници. Селяните ги наричат и “мошеници”. Работят на най-лесните и платени работи. Живеят в най-хубавите жилища, на центъра”<sup>31</sup>.

Първият селянин, с когото се среща кореспондентът Доган Улуч, също споменава за “червените”:

– Ако останеш още няколко дни, пази се от “червените”.

– Кои са тези червени?

– Турците, които са членове на Българската комунистическа партия. Те са изменници, които продават народа си, за да живеят добре. Ако някакъв “червен” се приближи към теб, истинските турци ще се отдалечат (Uluç 2009: 112).

Изключително интересна е статията на кореспондента от 27 март 1968 г., в която разказва как е бил следен от “червени” или агенти, които населението ненавижда. На излизане от хотела за предварително уредена среща, отвън “случайно” го пресреща Шукри Тахиров<sup>32</sup>, настойчиво иска да го заведе в Турския филиал на Кърджалийския театър и в апартамента на работещите в театъра – Али и Незахад Мехмедови, за да му демонстрира колко свободно и

<sup>29</sup> Soner, *Cumhuriyet*, 13.10.1969.

<sup>30</sup> Uygur, *Yeni Gazete*, 12.03.1969; 17.03.1969.

<sup>31</sup> Uluç, *Hürriyet*, 26.03.1968.

<sup>32</sup> Известен е и като Орлин Загоров.

добре живеят турците в България. Повече подробности за ролята на Шукри Тахиров, Доган Улуч дава в мемоарите си от 2009 г. Там описва как той настоява да го придружава по време на срещите му и колко трудно успява да се измъкне, за да отиде на уредена среща. На другата сутрин, още в 9 часа, Шукри Тахиров го чака във фойето. Завежда го в т. нар. Турския театър, където за изненада на кореспондента всички говорят и репетират на български. В апартамента на Али и Незахад Мехмедови, Шукри Тахиров му предлага да си избере една от двете жени, също работещи в театъра, опитва се да го напие. Кореспондентът подчертава, че хората в града така се страхуват от Шукри Тахиров, че след като го виждат с него, тези, които преди го канят къщи, никога повече не се появяват. А тези, които случайно го срещат по-късно, го подминават<sup>33</sup>. На другата сутрин, след гостуването, в хотела го чака началната учителка Айше Османова, говори за луксозния си живот и обвинява в леност турците, които не са устроени добре като нея (Uluç 2009: 112–115).<sup>34</sup> Кореспондентът прилага нейна снимка в луксозно облекло, доказателство за високия стандарт на “работливите” турци.<sup>35</sup>

На път от Кърджали за Хасково Доган Улуч посещава някакво село, където от един овчар чува, че селяните са предупредени от “червените” да не се оплакват от положението си, да не споделят мъките си и да не го канят къщи. Въпреки това, загрижените за себе си и за своите деца хора го умоляват: “Вземете ни оттук в майката-родина. Да опустее привидното им равенство и лъжливото им братството”.<sup>36</sup> Мъж го предупреждава да не вярва на “продажниците”, “мошениците” и “червените” – защото всички искали да отидат в Турция. Монтажник от Асеновград загрижено споделя: “Господине, Турция трябва много да внимава при това изселване. Иначе ще ви вкарат безброй “червени”, ще опропастьт народа ви.”<sup>37</sup>

Според репортажите местните “червени”, кметовете и партийните секретари участват в държавния терор. Салих Уйгур с учудване забелязва, че повечето от партийците са бивши имами или хаджи.<sup>38</sup> Журналистът обръща внимание върху голямата пропаст

<sup>33</sup> Uluç, *Hürriyet*, 27.03.1968.

<sup>34</sup> Uluç, *Hürriyet*, 28.03.1968.

<sup>35</sup> Uluç, *Hürriyet*, 28.03.1968.

<sup>36</sup> Uluç, *Hürriyet*, 25.03.1968.

<sup>37</sup> Пак там.

<sup>38</sup> Uygur, *Yeni Gazete*, 23.03.1969.

между партийци и безпартийни турци и подчертава, че партийците са заплашвани с отмъщение, ако отидат в Турция.<sup>39</sup>

**Голямата изселническа психоза –  
“И да пукнем, няма да се върнем”<sup>40</sup>**

Както вече беше подчертано, разказите на тримата журналисти съдържат автентична информация за живота, чувствата и настроенията сред турското население в навечерието на подписването на спогодбата и самото му стартиране. Изселването вълнува цялата общност, въпреки тесните рамки на спогодбата. Паниката и изселническата психоза стигат до краен предел, хората изоставят всичката си работа и започват да търсят начини за спасение от комунистическата диктатура. Българските власти издават паспорти за тримесечен срок на всички желаещи турци, това дава големи надежди, предизвиква напрежение и очакване, което се отразява върху ежедневието им. Турските дипломатически представителства от своя страна ограничават гостуванията, предпочитат се неженени младежи с образование, които по-лесно биха се устроили<sup>41</sup>.

През втората половина на март 1968 г. Шукри Мехмедов от Джебел, строител, баща на 8 деца, умолява консула в Пловдив: “Вестта за изселването заля цяла България. Навсякъде, във всяко село, по цяла България се събираме и говорим, само за това приказваме. Моля Ви, г-н консуле, не оставяйте в това горко положение толкова деца!”<sup>42</sup> Хората са изпаднали в паника, че ще се разделят с близки роднини, съседи и съселяни, които повече никога няма да видят, страхуват се от вероятността да останат без близки, сами в България, тъй като дълго време връзките между двете страни са напълно прекъснати. Изселническата психоза достига до такъв предел, че масово започват да правят постъпки за посещение на близки в Турция, за да останат като емигранти. Според консула в Пловдив броят на такива заявления годишно достига внушителната цифра 20

<sup>39</sup> Uygur, *Yeni Gazete*, 17.03.1969.

<sup>40</sup> “Ölmek var, dönmek yok” – поговорката, която турците често повтарят. Вж.: Уйгур, *Йени Газете*, 20.03.1969.

<sup>41</sup> Например с такива визи в Турция идват и остават Хилмие Барлас и Леман Ергенч, едната е завършила турска филология в София, а другата – в Баку. И двете се омъжват, като Ергенч сключва фиктивен брак с роднина. И двете стават преподавателки в Катедрата по руски език и литература в Анкарския университет.

<sup>42</sup> Uluç, *Hürriyet*, 25.03.1968.

хиляди, въпреки че шансът за получаване на разрешение е минимален.<sup>43</sup>

Шюкран Сонер през октомври 1969 г. споделя загрижеността си относно състоянието на хората, обхванати от изселническата психоза: “На направилите постъпки за гостуване в Турция се опитвам да обясня да не напускат работата си, защото има голяма вероятност да не бъдат одобрени. Те с усмивка продължават да твърдят: “Ето, преди два дни изпратихме едно семейство от село<sup>44</sup>. Приемете ни, готови сме да отидем като гости. Какво от това, че няма да продадем къщите си. Нека да останат на българите...” На Шюкран Сонер ѝ е пределно ясно, че шансовете им са много малки: “Според служителите ни в консулствата, от всички, които поради роднински връзки подават документи да гостуват в Турция, се разрешава само на 2-3 %. Почти всички, на които им се отдава възможност да отидат на гости, остават в Турция като емигранти.”<sup>45</sup>

Кореспондентът на *Хюрриет* Доган Улуч през март 1968 г. изтъква, че както турците в България, така и роднините им в Турция са изгубили покоя си. Консулството в Пловдив още сутринта се пълни с хора от Югоизточна България, по селата турците, които имат роднини в Турция, започват да продават градини, плугове и животни, без каквато и да е сигурност за заминаване, не се вслушват в обясненията на служителите от дипломатическите представителства и са готови да тръгнат без нищо.<sup>46</sup> По сведения от консулствата Шюкран Сонер пише, че 80% от турците са си извадили паспорти с надеждата, че един ден ще намерят начин и ще заминат за Турция. Плащат по 95 лева за паспорт, което е близо две заплати и през три месеца ги удължават, давайки за всеки от тях още по 35 лева. Разходите са огромни, защото става въпрос за цели семейства. Държавата печели, а хората дават последните си средства и не искат да се вслушат в думите на служителите в дипломатически представителства.<sup>47</sup> Както изтъква Салих Уйгур, те оставят наполовина строежа на къщите си, живеят ден за ден, като че ли всеки момент могат да тръгнат, макар че изселването все още не е започнало.<sup>48</sup>

---

<sup>43</sup> Пак там.

<sup>44</sup> Става въпрос за гостуване на роднини в Турция.

<sup>45</sup> Soner, *Cumhuriyet*, 14.10.1969.

<sup>46</sup> Uluç, *Hürriyet*, 24.03.1968.

<sup>47</sup> Soner, *Cumhuriyet*, 13.10.1969.

<sup>48</sup> Uygur, *Yeni Gazete*, 11.03.1969.

В самото начало на съобщенията за стартиране на преговорите, турци и помаци преустановяват работа и започват да се занимават с уреждане на документите, правят всичко възможно да се снабдят с покана от Турция. Например Мехмет Селим Хюсеинов споделя пред Салих Уйгур: “Този изселнически въпрос излезе преди две години, господине. Хората оставиха наполовина къщите, които бяха започнали.”<sup>49</sup> Халил Хюсеинов Мехмедов от разградското село С..., с когото Салих Уйгур се среща в Шумен пред “Томбул джамия”, е построил нова къща, но не иска да остане. Единствената му мечта е трите му деца да се изучат в Турция.<sup>50</sup> Както подчертава младата журналистка от в-к *Джумхуриет* Шюкран Сонер, от самото начало на преговорите за събиране на разделени семейства, хората непрекъснато се трупат пред консулствата в Бургас и Пловдив, идват от много далеч, харчат пари, чакат на опашки от 4-5 часа сутринта до 19-20 часа вечерта. Паркът пред консулството в Пловдив е пълен с хора, които предпазливо, тихичко разговарят помежду си и чакат. Ядат кашкавал и хляб, спят в евтини хотели или в парка при хубаво време.<sup>51</sup> Макар да са наясно, че не отговарят на условията на спогодбата, искат да чуят това лично от консула и когато получат отговора му, плачат и питат “Какво ще правим ние тук?”<sup>52</sup> Но и тогава не се спират, а тръгват към генералното консулство в София. Връщат се без надежда, но при следващите слухове за изселване, отново тръгват на път. А когато журналистката се опитва да ги убеди да не си губят напразно времето, те ѝ отговарят: “Какво да правим, дъще, надежда имаме. Може пък да се отвори някаква вратичка и да отидем.”<sup>53</sup>

Журналистът на *Йени Газете* Салих Уйгур цитира най-важните причини за настъпилата паника и изселническа психоза, споделени пред него: “Синовете, дъщерите ни се женят за българи, за цигани. Искаме да се женят за турци.”; “Партийците много ни тормозят, омръзна ни да ни третират като хора от втора категория.”; “Закриха турските училища. Децата ни трудно говорят турски. Не можем да приемем те да забравят родния си език.”; “Имаме право на един обор и 6 декара земя, а това не ни стига.”<sup>54</sup>

<sup>49</sup> Пак там.

<sup>50</sup> Uygur, *Yeni Gazete*, 21.03.1969.

<sup>51</sup> Soner, *Cumhuriyet*, 13.10.1969.

<sup>52</sup> Пак там.

<sup>53</sup> Пак там.

<sup>54</sup> Uygur, *Yeni Gazete*, 09.03.1969.



Разбира се, хората се страхуват да изразят всичко, което мислят. Но и споделеното е достатъчно, за да се направи извод за истинските причини за изселването. Подчертавайки, че стандартът на живота на селяните не е нисък, че имат хубави къщи, Салих Уйгур прави следното заключение: “Не може да ги спрат нито новите модерни къщи, нито удобните легла, нито асфалтираните пътища, нито телевизорите, нито това, нито онова...”<sup>55</sup> За постигане на свободно човешко съществуване, на правото на самоопределение, хората са готови да изоставят всичко и да започнат живота си отначало.

### Помаците и татарите

Както е известно, българските власти прилагат ограничения за изселване върху помаците още през 1930-те години и тези ограничения постоянно се засилват. Но през 1950–1951 г. няколко хиляди помаци, изселени в различни райони на страната, успяват да уредят документите си и да заминат, оставяйки близки роднини в България. В спогодбата от 1968 г. по настояване на българската делегация за пръв път се използва изразът “български граждани от турски произход”, който улеснява тоталитарната власт да забрани изселването дори на деца, чиито родители помаци са заминали през 1950–1951.

Желание за изселване имат почти всички помаци. Изплашени и наранени от насилствената асимилация през първата половина на 1960-те години, те се чувстват още по-несигурни от турците, без перспективи и надежда за спокойно бъдеще. Вестта за спогодбата предизвиква истинска радост сред помаците, те я възприемат като единствен начин за спасение от комунистическия терор. Хората по помашките села се събират, коментират възможностите за изселване, искат от близките си покани, правят си семейни снимки за изготвяне на паспорти<sup>56</sup>. Ентузиазмът и раздвижването в тези райони строго се наблюдава и следи от ДС. Една справка на районното управление на МВР в Гоце Делчев съдържа ценна информация по въпроса:

“Засилени протурски настроения се наблюдаваха (...) във всички случаи, когато е бил поставян въпросът за сключване на спо-

<sup>55</sup> Uyur, *Yeni Gazete*, 12.03.1969.

<sup>56</sup> Нашето семейство (сестрата на баба ми е заминала със семейството си от Кричим през 1944 г.), а и много други от родното ми село Корница получиха покани. В Корница беше дошъл фотограф, който правеше снимки на всички.

годби между правителството на НРБ и Турция по изселническия въпрос.

Около тези събития туркофилските елементи са организирали посещения в турските дипломатически представителства у нас, за да представят своите “претенции”, че са “турци” и да постигнат съгласие за тяхното изселване в Турция.

Последните масови настроения за изселване в Турция бяха през 1970 год., когато почти цялото население от Корница само за два дни изготви документите и бяха занесени на ръка в турското посолство<sup>57</sup>.

Издаването на паспорти на помаци е забранено. По време на изселването от 1969–1978 българската тоталитарна власт строго следи и не допуска заминаването дори на помаци от смесени семейства, като това става причина за разводи и дългогодишна раздяла на съпрузи, родители и деца. В такива случаи не помагат нито рушвети, нито връзки. Някои от смесените бракове се разпадат, като турците заминават с близките си, изоставяйки единия от съпрузите и децата си, други заминават без развод, надявайки се да изтеглят семействата си с помощта на турските власти, трети остават да живеят в България. Турчинът съпруг или съпруга трябва да избере дали да отиде сам, без децата си или да остане с тях в България.

Такъв е случаят със Сами Салимов Сюлейманов (род. през 1943 г.) от с. Средоселци, Разградско и Фатма Мерсимова (р. 1945 г.) от с. Брезница, Благоевградско. Съпругът е принуден да замине сам, оставяйки през 1977 г. съпруга, син Неджми (р. 1967 г.) и дъщеря Гюлзаде (р. 1970 г.) с надеждата, че ще успее да ги вземе с намесата на турските власти. Скоро след изселването Сами Салимов Сюлейманов започва работа като международен шофьор, за да вижда тайно семейството си във Варна, където тримата се преместват да живеят за по-добро прикритие, и най-вече в София при транзитните пътувания. Въпреки дългогодишните усилия на бащата да прибере семейството си, българските власти държат тримата като заложници, а когато през 1985 година имената им са сменени, не остават никакви надежди за събиране. Мъчителната раздяла продължава до лятото на 1989 г., когато семейството получава паспорти и заминава за Истанбул<sup>58</sup>.

<sup>57</sup> Държавна сигурност – смяната на имената – възродителният процес (1945-1985 г.), Том I, София 2013, с. 735.

<sup>58</sup> Информатор: Неджми Дьонмез, Анкара.

От репортажите на Шюкран Сонер научаваме, че условието “български граждани от турски произход” се използва и за недопускане на изселването на татарите. В статията си от 10.10.1969 г. тя отделя специална част на този въпрос, която озаглавява: “Проблемът на татарите”<sup>59</sup>. От журналистката разбираме, че българските власти в навечерието на стартирането на изселването пречат на татарите да заминат. По време на посещението си в посолството на република Турция в София тя среща група татари, за които разказва следното:

“В тези дни, когато изселническата спогодба влезе в сила, татарите в България непрекъснато сноват между турските консулства и официалните български инстанции, за да разрешат проблема си. В двора на генералното ни консулство в София разговарях с група татари, които не са могли да разрешат проблема си в другите консулства и са дошли в генералното. Представителите на татарите, които говорят много по-добре турския език от местното турско население, резюмираха проблема си така: “Роднините ни са в Турция. Тези, които отговарят на условията на споразумението, направиха молби и ни поканиха. Турското правителство ни даде визи. Сега българите ни казват: ‘Вие не сте турци, татари сте и не можете да заминете.’ Ние сме се родили и израдли като турци. Говорим турски, мюсюлмани сме. Не можем да разберем как татарите не са турци. Отиваме в турското консулство, където ни казват: ‘Не се страхувайте! При нас няма татари. Всички са турци.’ Преди в България ни смятаха за турци, тази татарска мода излезе наскоро.”<sup>60</sup>

### Раздялата

Покъртително е описанието на раздялата на едно семейство с близки и съселяни. 07.10.1969, сряда, село Черенча, Шуменско. Цялото село се е насъбрало пред двуетажна, бяла къща в центъра, за да изпрати семейството на Мустафа Мехмед. Повече от 500 души са пред дома му, наоколо цари пълна тишина. В градината на съседната къща възрастни жени тихичко плачат. Дори майката на Мустафа кротичко рони сълзи. Чувства се, че тя изпитва и някакво задоволство от заминаването на сина ѝ. Само братът на Мустафа Мехмед, който се е качил отзад на камиона, плаче с хълцане, защото не може

<sup>59</sup> Не ми е известно научно изследване по въпроса и не можах да намеря данни дали забраната продължава до 1978 г. или е прилагана само в началото.

<sup>60</sup> Soner, *Cumhuriyet*, 14.10.1969.

да замине. Изселващият се оставя зад себе си майка, братя и сестри, племенници и празна къща. Семейството на жена му е заминало през 1951 г., затова само той има право да отиде. Но нито майка му, нито братята и сестрите му са се опитали да го задържат. Мустафа Мехмед се разделя с близките си за бъдещето на своите деца<sup>61</sup>.

Журналистката Шюкран Сонер вижда как на гарата в Шумен митничарите разпорват дивани и дюшеци, за да търсят пари и ценности, а хората товарят евтини рогозки и стари софри. Само някои от тях имат телевизор, няколко нови фотьойла, хладилник, пералня. Журналистката, която е запозната много добре с материалното положение на изселниците от Югославия, прави следното заключение: “Това е цялото богатство на изселниците.” Един от заминаващите споделя: “Не ни позволиха да вземем дори използваната техника, която е вносна. Връщаха всичко, каквото поискат.”<sup>62</sup>

Шюкран Сонер свидетелства и за сърцераздирателното изпращане на гарата в Шумен, която е препълнена с близките на изселниците от Шуменско, Разградско и Търговишко. Всички полагат последни усилия, за да запазят самообладание. Възрастните целуват децата и безмълвно ронят сълзи. Присъстващите си разменят адреси, дават си дума да си пишат. Влакът трябва да потегли в 19.30 ч. Изпращачите се предупреждават да се отдалечат. Изведнъж хората, успели досега да погребат болката в сърцата си, излизат от чакалните на перона, не могат да издържат и започват да плачат на глас, да хълцат. Милиционерите с големи усилия дърпат изпращачите и бутат изселниците да се качат на влака, една майка изгубва съзнание...<sup>63</sup>

Повечето от пътуващите във влака 18 семейства не са могли да продадат къщите си. Които са успели, са ги продали 5-6 пъти поевтино от цената им. Ето какво споделя един от “щастливците”: “Преди 10 дни не знаехме кога ще тръгнем. Изведнъж ни уведомиха и ни казаха да се приготвим. За деня на тръгването научихме три дни по-рано. Нямахме време нито за продаване, нито за купуване на нещо. Парите [от къщата] разхвърлихме за това-онова, никаква полза не видяхме от тях.”<sup>64</sup>

<sup>61</sup> Soner, *Cumhuriyet*, 11.10.1969.

<sup>62</sup> Soner, *Cumhuriyet*, 15.10.1969.

<sup>63</sup> Soner, *Cumhuriyet*, 12.10.1969.

<sup>64</sup> Soner, *Cumhuriyet*, 15.10.1969.

Пътят е дълъг и изпълнен с напрежение. През нощта спят много малко, въпреки умората, всички възрастни са изнервени до краен предел. Сутринта вълнението им нараства, разхождат се нетърпеливо по коридорите, често питат за часа на пристигането, защото в Димитровград има 1, а в Свиленград 2 часа престой. Единственото нещо, което желаят, е час по-скоро да пристигнат в Одрин. Напрежението по лицата им не се изтрива и след като двама турски служители от Анкара се качват на влака в Свиленград. Едва когато около 15.00 часа влакът пристига на Одринската гара, журналистката забелязва отпускане и успокоение. С голямо учудване възприемат ръкопляскането и овациите на посрещачите. Тогава започват да се прегръщат и да плачат от радост. Стават по-разговорливи, питат журналистката кой говори пред микрофона, търсят място по прозорците, за да гледат фолклорната програма<sup>65</sup>.

### Събирането

Всички турски вестници от 9 и 10 октомври 1969 година съобщават за пристигането на първия влак с два пътнически и 7 товарни вагона, превозващ 18 семейства с 82-ма изселници, за тържественото им посрещане на Гара “Караагач” в Одрин с музика и маршове, народни хора, изпълнени от духовия оркестър на кметството. Валията произнася кратко слово, има делегация от Анкара, присъства и директорът на Червения полумесец. Плачат и изселниците, и посрещачите.

Печатът отразява потресаващи мигове от посрещането, радостта и трагедията на хора, които изживяват едновременно и щастие от събирането, и болка от раздялата. Настъпва краят на 18-годишната раздяла между някои родители и деца. В-к *Хюрриет* пише: “Баба Айше от Търговище беше разтворила ръце за молитва през прозореца на побледнелия зелен български вагон и плачеше: “Събрахме се, слава на Аллах!” Очите ѝ се бяха налели с кръв. Синът ѝ Мустафа, тичаше и като видя майка си, се прегърнаха. Тя целуна челото, косата, бузите му. Друг изселник каза: “Нали Аллах ни даде възможност да изживеем тази радост. Вече без съжаление можем да умрем!”<sup>66</sup>”

В-к *Йени Газете* от 10.10. 1969 в статията си под заглавие “Носим ви поздрав от останалите зад Желязната завеса” обръща

<sup>65</sup> Soner, *Cumhuriyet*, 12.10.1969.

<sup>66</sup> *Hürriyet*, 09.10.1969.

внимание на трагичната страна на това изселване, което не само събира, но и разделя. Някои се срещат с майките си, а други преди ден са се разделили със своите. Хасанов от с. Копрец, Търговишко със сълзи на очи нарежда пред кореспондента на *Йени Газете*: “Ето бе, ето... Майка ми все още е пред очите ми. Изпънала е ръцете си, хванала се е за железото на черния влак<sup>67</sup>. Като че ще може да го спре!... Очите ѝ са пълни със сълзи... Непрекъснато плаче на глас... ‘Не отивайте бе, сине! Къде отивате, оставяйки ни тук?’ Вие, и то така вие, че... Всички останаха там. Ние дойдохме, но те останаха, синко...”<sup>68</sup> Второто описание на ежедневника не е по-малко покъртително от първото: “Друга жена от съседното купе, на име Халисе Халилова се е залепила на прозореца. Погледът ѝ е закован безсмислено в някаква точка. Каквото и да я питаме, като надраскана плоча повтаря едно и също: “Кака ми остана там, кака ми... Единствената ми сестрица. Кой ще спаси сега сестрицата ми? Документите на нещастната бяха готови. В тези на мъжа ѝ имало нещо нередно. Хванаха го за ръката и го свалиха от влака... Черният влак не спря, за да можем да ги вземем в прегръдките си... да ги дръпнем при нас...”<sup>69</sup>.

Всички ежедневници пишат, че изселниците от Шуменско, Търговишко и Разградско са настанени в *Дома за гости*, където им се прави медицински преглед и регистрация.

### Мнения, предложения и критика на журналистите<sup>70</sup>

Кореспондентът на в-к *Хюрриет* в Англия Доган Улуч изпъква като журналист, запознат много добре с комунистическата система и популизма на диктаторските правителства. В България научава

---

<sup>67</sup> *Черният влак* в турския фолклор е символ на раздялата и на напразното очакване.

<sup>68</sup> *Yeni Gazete*, 10.10.1969.

<sup>69</sup> Пак там.

<sup>70</sup> Разбира се, че статиите на журналистите съдържат някои грешки и неточности. Но те не намаляват стойността на репортажите, изключително ценни с автентичността си. Във в-к *Сон хавадис* на 08.10.1969 г. започва публикацията на четвъртата поредица за изселването под заглавие “Балканските ни съседи: 2 България. Това, което чуждите не могат да видят”. В 13 статии Мазлум Кая (по всяка вероятност е псевдоним) много добре описва истинското положение на турците в България и критикува грешките и пропуските в статиите на тримата журналисти, които според него не са запознати добре с истинските условия на живот на турците и с политиката на комунистическата власт. Вж.: Kaya, Mazlum, “Balkan Komşularımız: 2 Bulgaristan. Yabancıların Göremedikleri”, *Son Havadis*, 08.10.1969-20.10.1969.

много неща за репресиите, ограниченията на гражданските права и свободи, за условията на живот на турците, затова в последната си статия предупреждава турското правителство да внимава какви хора ще допусне в Турция. Предчувствайки, че правителството на Демирел не познава истинския характер на комунистическата диктатура и диктаторските режими в социалистическия блок, той пише: “Между Турция и България започна да полъхва приятна приятелска атмосфера, осъществиха се контакти на високо равнище и срещи на добра воля, дори българският печат и българското радио промениха стила си, намалиха нападите си срещу нас, но въпреки това, трябва да бъдем резервирани”<sup>71</sup>.

Представителят на в-к *Йени Газете* изтъква неизгодните условия, при които турците от България са принудени да се изселят, негативните последици от тях. Той обръща внимание на един много важен момент: изселването може да събере разделените семейства, но то ще стане причина за разделяне на други. Тъй като в някои села почти всички са обвързани с роднински връзки, изселването на 80-90 хиляди ще причини още толкова разделени. Според Салих Уйгур проблемът не би се разрешил и с няколко изселнически спогодби. Затова, като единствен изход предлага създаване на приятелски отношения между двете страни, независимо от режима на управление, предоставяне на най-добри условия за гостуване или изселване на желаещите. Според него турците трябва да имат право да се изселват и да се връщат обратно, без каквито и да е ограничения. Накрая той подчертава, че за най-доброто разрешение на проблема са отговорни и двете страни<sup>72</sup>.

Най-критична към условията в спогодбата и начина на самото изселване е журналистката от опозиционния в-к *Джумхуриет* Шюкран Сонер, която става свидетелка на истинска човешка трагедия, резултат от исторически и политически събития, предизвикана от политически игри и манипулации, нямащи нищо общо с хуманността и съпричастността. Освен критика към българската тоталитарна власт, Шюкран Сонер отправя най-силни обвинения срещу правителството на Сюлейман Демирел и турското министерство на външните работи, свършили работата си наполовина. На реторичния въпрос какво е направила турската страна, тя отговаря: “Споразумението се подписа на 22 март 1968 г., до миналия месец август двете

<sup>71</sup> Uluç, *Hürriyet*, 28.03.1968.

<sup>72</sup> Uygur, *Yeni Gazete*, 27.03.1969; 28.03.1968.

страни няколкократно преговаряха върху начина и условията на изселването. Но според признанията на официални източници, правото да определи условията на преселването било предоставено на българската страна. До такава степен, че преди идването на първата група изселници в Турция, никаква турска държавна инстанция не оповестява каквото и да е за условията, при които тези хора ще бъдат изпратени. Докато първият изселнически конвой на гарата в Одрин се посрещаше тържествено с музика, служителите ни от различни държавни инстанции разпитваха дошлите за условията, на които са били подложени, много сериозно си водеха бележки...

Тя ясно подчертава, че първата група изселници са жертва на политиката на управляващата партия. Журналистката обвинява турските власти, неуспели да осигурят правото на изселниците да внесат поне малко български левове за първи нужди, което би обърнало условията в тяхна полза. Тя специално обръща внимание на пристигането на първата група на 8 октомври, точно преди парламентарните избори на 12 октомври в Турция, което не може да бъде случайно. Окачествява политическите сметки на правителството като неетични, навредили единствено на изселниците, които са уведомени да тръгнат неочаквано и се озовават в Одрин, без дори да осъзнават какво ги е сполетяло. Като заключение на последната си, пета статия, Шюкран Сонер цитира заглавията на статии в турските вестници, които подчертават действителното положение на изселниците: “Изселниците, настанени в *Дома за гости* в Одрин, останаха без каквито и да е пари”; “Изселниците, които нямат никакви пари, не могат да се придвижат до роднините си”; “Изселниците са докарали дори старите си дървени софри”; “Изселниците не разполагат с никакви пари. Донесли са само малко кашкавал, суджук и цигари”.<sup>73</sup>

Благодарение на свободния турски печат днес може да се възстанови част от истината за напрежението и паниката сред турците в България в навечерието на изселването от 1969-1978 г. Репортажите и статиите във вестниците ни предлагат богат материал за страданията и лишенията, които хората са принудени да изживеят във вихъра на изселнически политики и партийни интереси на двете страни.

### Библиография:

Баев, Йордан, Котев, Николай. 1994. “Изселническият въпрос в българо-турските отношения след Втората световна война, II част”. Международни отно-

<sup>73</sup> Soner, *Cumhuriyet*, 15.10.1969.



шения, кн. 2, год. XXIII. [Baev, Yordan, Kotev, Nikolay. 1994. "Izselnicheskiyat vapros v balgaro-turskite otnosheniya sled Vtorata svetovna voyna, II chast"].

**Баева, Искра, Калинова, Евгения. 2009.** "Възродителен процес" Българската държава и българските турци (средата на 30-те – началото на 90-те години на XX век), Том I, София. [Baeva, Iskra, Kalinova, Evgeniya. 2009. "Vazroditelen protses" Balgarskata darzhava i balgarskite turtsi (sredata na 30-te – nachaloto na 90-te godini na XX vek)].

**Баева, Искра, Калинова, Евгения. 2013.** Следвоенното десетилетие не българската външна политика (1944–1955). Лекционен курс. Второ преработено издание, София. [Baeva, Iskra, Kalinova, Evgeniya. 2013. Sledvoennoto desetiletie ne balgarskata vanshna politika (1944–1955)].

**Държавна сигурност – смяната на имената – възродителният процес (1945–1985 г.), Том I.** София, 2013. [Darzhavna sigurnost – smyanata na imenata – vazroditelniyat protses (1945–1985 g.)].

**Калинова, Евгения. 2016.** "Пътят към втората изселническа спогодба между България и Турция (50-те – 60-те години на XX век)". В. Послания на историята. Юбилеен сборник в чест на професор Мария Радева, София. [Kalinova, Evgeniya. 2016. Patyat kam vtorata izselnicheska spogodba mezhdu Bulgariya i Turtsiya (50-te – 60-te godini na XX vek)].

**Къльч, Осман. 2020.** Жертва на съдбата, прев. от турски Зейнеп Зафер, София. [Kalach, Osman. 2020. Zhertva na sadbata].

**Ялъмов, Ибрахим. 2002.** История на турската общност в България, София. [Yalamov, Ibrahim. 2002. Istoriya na turskata obshtnost v Bulgariya].

**Gökatalay, Gözde Emen. 2021.** "A crisis of legitimacy or a source of political consolidation? The deportation of Bulgarian Turks in 1950–1951 and the Democratic Party, Middle Eastern Studies", 03. May 2021, p. 1–15.

**Каѝа, Mazlum.** "Balkan Komşularımız: 2 Bulgaristan. Yabancıların Göremedikleri", *Son Havadis*, 08.10.1969–20.10.1969.

**Soner, Şükran.** "Göç", *Cumhuriyet*, 11.10.1969–15.10.1969.

**Şimşir, Bilal. 1986.** Bulgaristan Türkleri, Ankara.

**Улуç, Dođan.** "Büyük Göç", *Hürriyet*, 24.03.1968–28.03.1968.

**Улуç, Dođan. 2009.** Kupa Ası. Olaylar İçinde Olaylar, İstanbul.

**Уѝгур, Salih.** "Büyük Göç Başlıyor. Tuna Boylarından Anadolu'ya", *Yeni Gazete*, 11.03.1969–28.03.1969.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.7>

**Özlem Hocaoğlu**

*Istanbul University, Social Science Institute (Turkey)*

[hocaogluozlem@gmail.com]

**Apak Kerem Altıntop**

*Istanbul University, Social Science Institute (Turkey)*

[apakkerem@gmail.com]

**Nurcan Özgür Baklacioğlu**

*Istanbul University, Social Science Institute (Turkey)*

[nurcanozgur@hotmail.com]

## **“I will Enter the Suitcase and I will not Make a Sound until we Pass the Border...”**

**Abstract:** *The article elaborates the crossborder experiences and strategies of family divide and unaccompanied childhoods in the context of crossborder migrations and smuggling across Bulgaria-Turkey border between the years of 1990-2001. The authors dig into the long-run impact of smuggling and imposed illegality on the migrant children and the means, manners, strategies and dangers hidden within crossborder cyclical mobility and administrative construction of illegality under the political and economic transitions and turbulence across sending and receiving countries. Left to the forgetfulness of the history unaccompanied child migration experiences between Bulgaria and Turkey contain significant lessons in regard to the role of restrictive and security based visa and migration policies. Our study aims at further investigation and understanding of these experiences via fieldwork containing semi-structured interviews with 13 smuggled children and their parents. The article begins with introduction to the political and economic conditions that led to irregularization of child migrations across Bulgaria-Turkey border between 1990-2001. It follows presentation of data collected during the Istanbul University BAP Research Center supported fieldwork and follows elaboration on the memories, experiences and prevailing perceptions of these crossborder experiences by the trafficked children and their parents.*

**Key words:** *Child Migration; Bulgaria; Turkey; Separated Childhood; Border Experience.*

### **Introduction**

The hegemonic migration rhetoric bases mainly on the prevailing perception of the migrants and refugees as adult males. However, 2018

data shows that approximately 28 million (approximately 39.5%) of the total 70 million 800 thousand forcibly displaced people consist of children. Indeed, about half of the 25.9 million refugees in the world are also children.<sup>1</sup> Children make up a considerable proportion of the forcibly displaced people in the world, as well. Beside these numbers, the mainstream migration scholarship remained a bit irrelevant to the unaccompanied children experiences. The recent unexpected growth in the number of Syrian unaccompanied children within the EU, shifted academic interest to the unaccompanied refugee children. Until the Syrian war and the tremendous mass displacement of millions of single women and unaccompanied children, refugee children have been approached a priori as a part of their families, thus refugee children policies have been designed as part of the modern family conceptualisation. The current drastic increase in the number and rate of the refugee, migrant and IDP children raised important challenge to this prevailing approach and scholarship, that requires further children-centered research and approach to the children on the move.

The following study aims at investigating the trafficked children's border experiences and coping strategies before, during and after migration across Bulgarian-Turkish border. The scope of the research involves both the experiences and coping strategies of the accompanied and unaccompanied children and their families. The first chapter elaborates on the general concepts and methodology of the research, as well as the available relevant academic literature. The second chapter examines the structural and policy-related causes and conditions that lie behind the investigated Bulgaria-Turkey crossborder child trafficking between the years 1990-2001.

### **1. Studying Children at the Borders: concepts, methodological problems, ethical limits**

The underground history of conflict and refuge is full with forgotten stories of unaccompanied children, divided families, single parenthoods, child parenting etc. All those stories remained hidden behind the wall of the hegemonic masculine and modern migration literature. The war in Syria and the following refugee crisis unveiled the stories of these forgotten children on the move and raised numerous ques-

---

<sup>1</sup> UNHCR, *Global Trends: Forced Displacement in 2018* (The UN Refugee Agency, 2019), <https://www.unhcr.org/5d08d7ee7.pdf>.; Emily Garin vd., *Uprooted: The Growing Crisis for Refugee and Migrant Children*, 2016.

tion related to the cross-cultural and crossborder definition of the childhood itself, the migration experience of the refugee children, the rights of the unaccompanied children on the move, at the borders, at the destination country etc. There are numerous untold stories about crossborder experiences of the refugee children, especially refugee girls that often face gender-based violence, while boys stay often exploited as a cheap labour force.

Millions of migrant and refugee children are forced or induced/no other option to cross borders via traffickers today. The numbers are tremendous especially across Thailand-Burma-China borders, South Asian borders and Central Mediterranean, while concepts of unaccompanied, divided family and single parenthood, childhood and forced migration are under prior research.

#### **a. Defining Unaccompanied Children on the move**

Academic studies are based on the modern definition of the concept of child as designed under the International UN Convention on the Rights of Children that sets up an universal definition of children as human being under the age of 18 and provides a universal set of standards to be adhered to by all countries. According to this novel understanding of the convention the children are not anymore approached and treated as property of their parents but are not also object to any charity. Instead no matter where, at home, at destination country, on the road, at the prison or at the work place or school, children have their rights that states are obliged to follow. With or without parents each child is treated as individual to be protected under certain rights and state responsibilities. The UNICEF Inter-Agency Guiding Principles on Unaccompanied and Separated Children (2004) and the Red Cross Committee brought further definition in regard to the unaccompanied children whose number increased during the 21<sup>st</sup> century as result of the localisation of the conflicts and increase and broadening of insecurity. These main documents defined unaccompanied minors as “children separated from both parents and other relatives and not cared for by a person responsible by law or custom to look after them”<sup>2</sup>

---

<sup>2</sup> Uluslararası Kızılhaç Komitesi, *Refakatsiz ve Ailesinden Ayrı Düşmüş Çocuklar'a İlişkin Kurumlararası Rehber İlkeler*, (International Red Cross Comitte, 2014), <http://www.unicef.org.tr/files/bilgimerkezi/doc/REFAKATS%C4%B0Z%20ve%20A%C4%B0LES%C4%B0NDEN%20AYRI%20D%C3%9C%C5%9EM%C3%9C%C5%9E%20%C3%87OCUKLAR.pdf>.

Although there are no clear data about the unaccompanied children on the move, the available data say that there are 138,600 unaccompanied and separated children moving around the world. In 2018, it was reported that 27,600 unaccompanied and separated children sought asylum in various countries. Studies talk about a total of 111,000 unaccompanied and separated child refugees.<sup>3</sup> Reports also say that the unaccompanied migrant children that arrived to the US during the last decade tripled.<sup>4</sup> The fast movement of the capital triggered movement among the cheap child labour force across the Mexico-US borders and Central Mediterranean. However, important obstacle in regard to the available data on unaccompanied children on the move is due to the irregular ways that refugee and migrant children are forced to use while searching for both refuge or survival work. As result of securitisation of international mobility, visa policies and border passages, most of unaccompanied children have no other option than using trafficker's services. That is why the studies estimate that the real number of the unaccompanied children on the roads is much higher. The ecological insecurity (natural disasters, drought etc)<sup>5</sup> and poverty (unemployment, hunger) are expected to cause more divided families and further displacement and forced migration of unaccompanied children.

Forced migrations in general involve “ *migratory movements which, although the drivers can be diverse, involve force, compulsion, or coercion...*”, as well as “...in some instances, victims of trafficking”.<sup>6</sup> Majority of the children trafficked across international borders today are not only refugees separated from their families as result of conflict or war, but also objects of trafficking or children seeking family reunification. Restrictive visa and border security policies force children who seek family reunification to become objects of trafficking, as in the case of the trafficked children between Bulgaria and Turkey. Indeed, the security-based EU reunification policies also force children to join their families in the EU via expensive and dangerous services of the traffickers<sup>7</sup>, that often include “... coercive threats to life and prosperity due to natural or

---

<sup>3</sup> UNHCR, *Global Trends: Forced Displacement in 2018*.

<sup>4</sup> International Organization for Migration, *Children on the Move.*, 2015, <http://www.deslibris.ca/ID/246662>.

<sup>5</sup> Columbia University, “Forced Migration Learning Module”, 30 Eylül 2019, <http://www.columbia.edu/itc/hs/pubhealth/modules/forcedMigration/definitions.html>.

<sup>6</sup> IOM, “Glossary on Migration” (International Organization for Migration, 2019).

<sup>7</sup> House of Lords ve EU Committee, “Children in crisis: unaccompanied migrant children in the EU”, 2016.

man-made reasons." Indeed, reports and studies point to coercive treatment against the will of the refugees and migrant children across borders.<sup>8</sup> Studies on migration journeys of unaccompanied children detect increase in the cases of sexual harassment and abuse of refugee and migrant children.<sup>9</sup> Grover's study takes a legal approach and examines child refugees under human rights law by pointing to the dangerous intersection of refugee children's individual rights and collective migration control measures.<sup>10</sup>

The problems and ill-treatment of unaccompanied children do not end at the EU countries as well. Irregular journeys very often follow exploitation and various abuses, while destination countries, even when they are EU member states obliged to follow the EU law, are not always welcome.<sup>11</sup> Indeed, the study of Gornik, Sedmak and Sauer<sup>12</sup> examines the best interests of the unaccompanied refugee children and finds out that unaccompanied minors in Europe are most often caught between compassion and pressure that may serve as a ground for both longstanding traumas or further abuse. Last news point to the retreat from the human rights perspective in favour of prevailing charity-based approach and policies in regard to the unaccompanied minors. The lack of global approach to the unaccompanied migrant and refugee children leads to strengthening of the local perspectives and charity-based solutions to the problems of displaced children.<sup>13</sup> Majority of the countries provide standardized protection for the unaccompanied refugee children, while migrant children remain often under irregular status, expected to return back to their families living at the destination countries. Most of the Afghani, Iraqi and African youth leading to the EU markets consist of

---

<sup>8</sup> IOM, “Göç Terimleri Sözlüğü” (Uluslararası Göç Örgütü, 2009).

<sup>9</sup> Marisa O. Ensor, *Children and forced migration* (New York, NY: Springer Berlin Heidelberg, 2016).; Harvard University, “Emergency Within an Emergency: The Growing Epidemic of Sexual Exploitation and Abuse of Migrant Children in Greece” (Harvard University, 2015).

<sup>10</sup> Grover, *Child refugee asylum as a basic human right: selected case law on state resistance* (New York, NY: Springer Berlin Heidelberg, 2018).

<sup>11</sup> “Approaches to Unaccompanied Minors Following Status Determination in the EU plus Norway”, Synthes Report (European Migration Network, Temmuz 2019).

<sup>12</sup> Mateja Sedmak, Birgit Sauer, ve Barbara Gornik, ed., *Unaccompanied children in European migration and asylum practices: in whose best interests?*, Routledge research in asylum, migration and refugee law (London ; New York, NY: Routledge, 2018).

<sup>13</sup> Esther Salmerón-Manzano ve Francisco Manzano-Agugliaro, “Unaccompanied Minors: Worldwide Research Perspectives”, *Publications* 7, sy 1 (28 Aralık 2018): 2, <https://doi.org/10.3390/publications7010002>.

minors whose families remain at the destination countries, while the children move to the EU countries to find better jobs and living standards. The global capital movements produce more and more separated families and unaccompanied minors crossing the dangerous EU borders.

Turkey constitutes crossroad for unaccompanied minors leading for the EU markets. It hosts tens of thousands unaccompanied migrant minors from Africa and Afghanistan, thousands refugee minors from Syria. As pointed by Gürler<sup>14</sup> before years the unaccompanied minors from Africa were being provided with public protection until the age of 18, while nowadays most of these children join the cheap child labour force in the construction or agricultural sectors. While the last century international borders used to observe less unaccompanied children and more family reunifications, even in cases of child trafficking, today international borders construct the unaccompanied minors as cheap modern slaves open for gender-based of social abuse or criminals that violate the sovereign national borders and EU immigration law. Indeed, there were important regional differences as well. While children in the 20<sup>th</sup> century transition countries (i.e. Eastern Europe, post-Soviet countries) were being usually separated/left behind by their parents as result of economic emigrations or irregular crossborder labor movements and irregular stays, the 21<sup>st</sup> century migrant and refugee children from Asia and Africa are leading to the European markets in order to find well-paid jobs and sent remittances to their families at the source countries. The mainstream migration literature has been rather reluctant to both of these experiences and movements until 2018, when Jacquiline Bhabha, J. Kaniks, and D.S. Hernandez edited a *comprehensive Research Handbook on Child Migration*. Nowadays, the migration research in Turkey started to recognize the prevailing number of minors among the Afghani refugees in Turkey.

There are numerous studies about political and economic aspects of the migrations between Bulgaria and Turkey, however none of them have touched upon the issues such as child trafficking, separated families, unaccompanied child migration that took place between 1990 and 2001. There is no available research about the border experiences and coping strategies of the unaccompanied minors and separated children who were trafficked from Bulgaria to Turkey in order to join their parents or bigger families during 1990's. Most of those children were trafficked and thus

---

<sup>14</sup> N. Şule Gürle, "İstanbul'da Refakatsiz Sığınmacı ve Mülteci Çocukların Karşılaştıkları Sorunlar ve Uygulamalar" (Yüksek Lisans Tezi, İstanbul Üniversitesi, 2012).

many of them had to live irregular lives because of their parent’s visa overstay. For this and alike reasons our research and study had to cope with and clarify numerous methodological challenges and ethical issues.

### b. Ethical and Methodological Moments

The first challenge during our research was related to the issues of safety, informed consent, ethical dilemmas, avoidance of potential harm, limits of confidentiality and the access to the respondents involved or smuggled between Bulgaria and Turkey.<sup>15</sup> Although the main researcher was an insider itself, the fear of revealing the stories of border smuggling journeys was not easy. Respondents were children of divided families or members of these families who migrated between the years 1990-2001 because of economic crisis in Bulgaria and restrictive visa policies between Turkey and Bulgaria. Children included in the study grew up in Bulgaria, separated from their parents who usually had to live and work in Turkey. During the fieldwork all of the children were grown. Since the recipients of the field study were not easily accessible, the study appropriated snowball sampling method in selecting and reaching the recipients. Semi-structured interviews mixed with oral history were conducted with 21 persons between June 2018 and September 2019. The in-depth semi-structured interview method was chosen for this research because it allows to address certain aspects of the research questions while leaving space for participants to express freely their stories while bringing up new meanings to the research topic. In this context, the fieldwork involved 13 (n1 = 13) persons who were child during 1990’s, and 8 (n2 = 8) parents.

While the recent average age of the participants (n1) is 29, 54% of them are women and 46% are men.

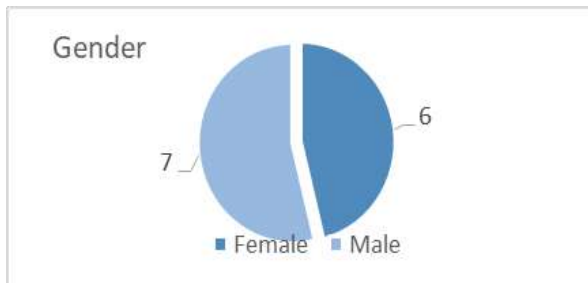


Figure 1: Gender structure of the respondents

<sup>15</sup> Sheldon X Zhang, “The Ethical Minefield in Human Trafficking Research : Real and Imagined”, in Dina Siegel, Roos de Wildt ed. *Ethical Concerns in Research on Human Trafficking*, Jan 2016, p.85-96



Interview questions were designed to understand migration and border experiences, examine how smuggled children experienced and recall migration, determine whether they were with single parenthood or unaccompanied, as well as examine the relevant coping strategies. The interviewees were informed about the purpose of the interviews and their approval was obtained. Audio and video recording were not used in order to make participants feel more safe and comfortable to share their experiences. Instead of recording, we favoured taking notes during the interviews. The interviewees were named numerically, from 1 to 13 participants in the text. The following table shows the age and gender of the participants to the fieldwork:

Participants	Gender	Age	Age at Year of Migration
1	Male	30	10
2	Male	24	12
3	Female	23	0
4	Male	32	10
5	Female	26	4
6	Male	31	13
7	Male	39	17
8	Female	24	4
9	Male	25	3
10	Male	37	15
11	Female	35	15
12	Female	31	11
13	Female	26	8

*Table 1: Gender and Age of Participants*

Majority of the respondents live and work in Turkey and have dual citizenship.

## **2. Conditions and causes for Irregular migrations from Bulgaria to Turkey between 1990-2001**

In the post-Cold war globalizing world, the circulation of capital, people, raw materials and products has accelerated tremendously. Following the disintegration of the Soviet Union and the end of the Cold War the economic and political instability in the Eastern European coun-

tries caused intensive brain drain, outsourcing and irregular labour migrations towards the Western markets.

The shock-therapy transition strategy from planned to market economy in the former socialist states had destabilising and negative macro and micro effects on the economy and society in the region. The economic contraction, lack of investment, stigmatisation of production, wide unemployment, wars and war embargoes in the Balkans and deepening poverty caused refugee and migrant movements. Most of these movements were irregular,<sup>16</sup> as result of the traditional security-based national restrictions to the free movement of people. 1990's recorded intensive crossborder movements, suitcase trade, labour and irregular migrations from Bulgaria, Russia, Moldova, Ukraine, Georgia and Romania. Most of these movements were oriented towards Turkey. Indeed, during 90's Turkey had been important commercial market for all former Eastern Bloc countries. Because of the close distance and common borders Turkey became the primary commercial destination for thousands Bulgarian suitcase traders and jobless workers after the fall of the Bulgarian Communist Party regime in November 1989.

#### **a. Push factors behind the post-1989 migrations to Turkey**

After the resignation of the Bulgarian Communist Party leader Jivkov in November 1989, Bulgaria started to clash between harsh and painful waves of change and transformation following shock-therapy transition from a centrally planned economy to a market economy and neoliberal capitalist system. The first neoliberal program was put into practice on February 1, 1991, as a result of negotiations with the IMF.<sup>17</sup> The first steps of the new Bulgarian government were related to the privatization of industrial enterprises expropriated by the old regime, the closure of cooperative farms and the return of land. Production fall almost to zero. As a result of the rapid withdrawal of the state from the economy and privatizations of the state enterprises, unemployment increased and the Bulgarian currency (Leva) lost value. As participant 5 stated, the devaluation of Leva was radical:

<sup>16</sup> Didem Danış- Ayşe Parla “Nafile Soydaşlık: Irak ve Bulgaristan Türkleri örneğinde göçmen, dernek ve devlet”, *Toplum ve Bilim*, 114 (2009), s.140.

<sup>17</sup> Caner Sancaktar, “Balkanlar’da Devletçi Sosyalizmden Kapitalizme Geçiş: Arnavutluk, Bulgaristan ve Romanya”, *Balkan ve Yakın Doğu Sosyal Bilimler Dergisi*, 05/02 (2019), s.59.

*“My family migrated due to lack of job opportunities. There was an economic crisis, there was a change of money in 1996, for example, when I was born, my family saved money in one bank account. When I turned 18 I withdrew only a lef (Bulgarian currency) from that money. That money exchange destroyed all. ”*

Prices were left to the free market mechanism, which led to a sudden increase in overall inflation up to %500. The most serious economic crisis in Bulgaria happened at end of 1996 and the beginning of 1997 as result of delay in structural reforms, increase in the amount of foreign debt, lack of foreign investment, rapid devaluation, increase in unemployment, weak welfare state and blocked social security policies.<sup>18</sup>

The father of participant 10 give examples of economic crisis combined with feeling of discrimination and lack of trust:

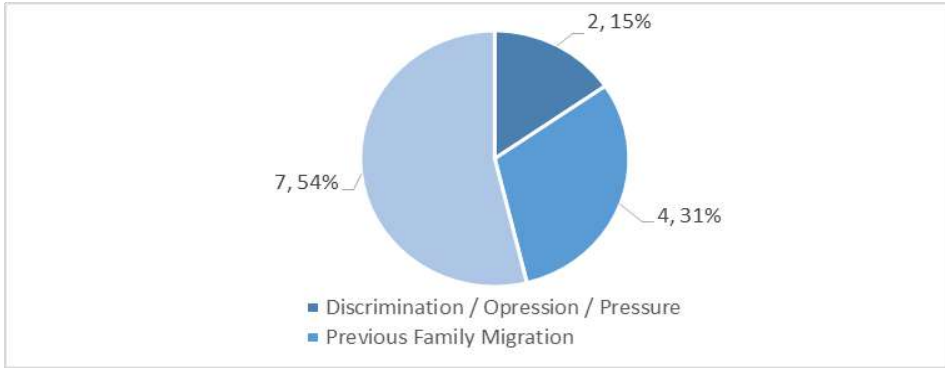
*“I had 10500 dollars. There was a bank that gave a high-interest rate, we invested the dollars there. Then the bank went bankrupt at that time, the day it went bankrupt we could not withdraw that money. We were able to withdraw the money after two months and fifteen days. I went to the bank to get my money. They made a list and said you come in two months. At that moment I realized that I was a second class citizen and the economy would not improve. At that time, inflation rose, 4 times, 5 times. I could hardly get 1100 Marks from the money I deposited in that bank. Somehow the Bulgarians learned about the crisis and saved all their money. We were not given information. I lost a lot of money. I woke up one morning, the dollar went from 4 Leva to 10 Leva in one day. I said I won't stay here anymore, Bulgaria is not for me. ”We arranged a smugglers truck and sent my children with their mother.”*

The uncontrolled transition to market economy have brought a severe social and economic challenge to Turkish and other Muslim minorities who constituted the major part of the agricultural and industrial workforce. The closure of cooperative farms and small industrial enterprises left them without a livelihood.<sup>19</sup> The Bulgarian Socialist Party led government, which won the general elections in 1994, did not pay particular attention to the situation of Turkish and other Muslim minorities and continued the previous populist governments' policy of ignoring their

<sup>18</sup> Ali Dayıođlu, *Toplama Kampından Meclis'e: Bulgaristan'da Türk ve Müslüman Azınlığı*, İstanbul: İletişim Yayınları, 2005, s.470-471.

<sup>19</sup> Ş. İnan Rüma, “Kalanlara Ne Oldu? Bulgaristan'da Azınlık Haklarının Gelişiminde AB Genişlemesinin Etkisi,” 89 *Göçü: Bulgaristan'da 1984-89 Azınlık Politikaları ve Türkiye'ye Zorunlu Göç*. Ed. Neriman Ersoy-Hacısalihiođlu ve Mehmet Hacısalihiođlu (İstanbul: BALKAR&BALMED, 2012) s. 361.

particular problems.<sup>20</sup> Land privatization left millions of villagers without land, while the land was appropriated by corrupted companies. The decrease in purchase/demand in tobacco and crop production, where the majority of minorities used to work, brought further unemployment in the agricultural sector as well.<sup>21</sup> High unemployment rate and poverty had triggered waves of emigrations from the minority-populated regions. Some of the families undergone secondary migration between Turkey and Bulgaria: *"We immigrated to Turkey in 1989, my son was born here too, but then we returned to Bulgaria again, because my father-in-law was sick. We came back to Turkey in 1998. My husband and I both were trying to emigrate earlier but because of our economic situation, we were not able. We couldn't even meet our basic needs with the money we earned there.(in Bulgaria)"*



**Figure 2: Motives for Migration**

Indeed, almost all of the parents of the interviewed pointed to the role of economic problems and unemployment as main reasons for emigration. Most of the children also emphasized that they were too young to have their own will in their decision to migrate. For most of them had to follow their parents' decisions for family reunification. Most of the families/parents expressed various intertwining motives and factors that facilitated the decision for emigration to Turkey. Kinship relations, relatives, knowledge of Turkish language, love or desire to live in Turkey,

<sup>20</sup> Elena Marushiakova and Vesselin Popov, "Muslim Minorities in Bulgaria" (conference paper: Migration and Political Intervention: Diasporas in Transition Countries). Berlin: Parabolis, 2004.

<sup>21</sup> Kader Özlem, "Soğuk Savaş Sonrası Dönem Türk-Bulgar İlişkilerinde Türk Azınlığın Durumu", (Yüksek Lisans Tezi, Uludağ Üniversitesi, 2010), s.166-167.

social and ethnic discrimination in Bulgaria designed their preferences to emigrate to Turkey.

While before 1990, Bulgarian Turks used to migrate to Turkey due to ethnic cleansing, political oppression etc. reasons, after 1990, Bulgarian Turks preferred Turkey for both economic and linguistic reasons. While undergoing social discrimination in Bulgaria, their mother tongue combined with the knowledge of Russian and Bulgarian was facilitating their employment and adaptation in the than dynamic Turkish market. Turkey was the most preferred destination for those who wanted to escape the economic crisis and growing ethno-economic discrimination in Bulgaria. Lack of employment and the deep economic crisis triggered nationalist feelings and ethnic discrimination against the Turkish and Muslim minorities. Participant 2 says:

*"My father had emigrated to Turkey in 1999 because he undergone mobbing and opposed his manager in Bulgaria. His director made derogatory and racist words to the Turks working there. So, fedup with this, my father came to Turkey. My mother also came here in 2000 while I remained there with my grandmother, grandfather and sister."*

After November 1989, Turkish and Muslim minorities in Bulgaria gained back their political and cultural rights. They were free to get back their own native Turkish or Muslim names and exercise their linguistic and religious rights and freedoms. The political power of the Movement for Rights and Freedoms, consisting mostly of Turks and Muslims, facilitated the access to these rights and freedoms as well.<sup>22</sup> Majority of the Turks and Muslims claimed their mother-given names back. However, the ethno-economic discrimination forced many Turks and Muslims in Bulgaria to keep the Bulgarian names in order to avoid ethnic discrimination during their search for better quality employment, public jobs or social assistance. Another reason for keeping the Bulgarian names during 1990's was to facilitate the applications for Turkish visa. The up-cited push factors were not well accommodated by Turkey's visa policy that limited the mobility of the Bulgarian Turks and Muslims.

#### **b. Turkey's Visa Policy implications for post-1989 Turkish emigrations from Bulgaria to Turkey (b/w 1990- 2001)**

Until 1989 Turkey used to implement the Act of Settlement of 1934 and provided facilitated immigration regime and transition to citi-

---

<sup>22</sup> Sezgin Nuray, "Soğuk Savaş Sonrası Değişen Uluslararası Sistemde Türkiye-Bulgaristan İlişkileri" (Yüksek Lisans Tezi, Uludağ Üniversitesi, 2001), s.147-152

zenship for the kin immigrants who often found themselves in Turkey as result of forced migration or exile. The post-1989 economic instability and following migration flows raised fear of mass inflow of another thousands of Turks from Bulgaria to Turkey. Taking under consideration the worsened economic situation in Bulgaria, Turkey launched preventive visa policy against the potential Turkish immigrants from Bulgaria.<sup>23</sup> Under these regulations and restrictions kin immigrants were expected to obey certain visa restrictions and prove the availability of relatives in Turkey.

In general, crossborder movements between Bulgaria and Turkey were rather liberal for the Bulgarian citizens of Bulgarian origin. They could easily visit Turkey and extend their stay for long periods. Visa restrictions were applied to Bulgarian citizens of Turkish or Muslim origin who initiated visits to Turkey. Bulgarian Turkish emigration to Turkey was regulated under special rules and visa conditionality that apprehended family migration to Turkey. Bulgarian Turks were provided visas under certain conditions that aimed at preventing long run family emigrations or settlement in Turkey. According to these restrictions family members were supposed to visit Turkey separately by leaving one part of the family (one of the parents or kids) in Bulgaria. Thus married couples were not able to take visa at once and travel together to Turkey. As a warranty when a family member obtained a visa, other family members' passports were stamped with black stamps to ensure that other members of the family were not entitled to a visa until her/his return. The rest part of the family was entitled to a visa, after his/her return to Bulgaria. The mother of participant 9 describes this practice as follows:

*“I had to emigrate to Turkey with a fake passport. So I had 2 passports. (one with Turkish and one with Bulgarian name). Because at that time only one person for each family could get a visa to go to Turkey. My husband came (to Turkey) with a visa. While he was getting that visa they had put a black mark on my passport. This was going to show that I can not get a visa to Turkey until his return. That's why I got a fake passport. I emigrated thanks to a fake passport. My husband came here and left me a black-sealed passport. I also issued a new passport, saying that my passport has been lost. I did not pass my husband's surname, I used my own last name. I went to Burgas to apply for a visa. The official*

<sup>23</sup> Berrak Çeçen, “Bulgaristan'dan Türkiye' ye Gelen Düzensiz Göçmenlerin Yasallaşma Süreçlerinde Değişen Yasal Düzenlemelerin Rolü”, *İstanbul Ticaret Üniversitesi Sosyal Bilimler Dergisi*, 29/2 (2016), s.274.

*there was not giving us visa. There was a couple waiting on the cue behind me- they made a fake marriage in order to get Turkish visa. I asked the officer for the reason 'Why don't you give me a visa? I could not change my passport because I do not have money.' The man next to me also said that. It was very stressful but at the end me and the other couple behind me succeed to get visas. But all this was so stressful and tiring. But what to do, this was the only solution left. "*

So, many Turks or Muslims who wanted to take Turkish visa had to use illegal documents or keep the Bulgarian names.<sup>24</sup> While family members left in Bulgaria were searching for ways to pass to Turkey, the family members who succeed to settle in Turkey had to accommodate themselves to irregular way of living. Turkish women were preferred as maids at the families in Turkey, thus usually they would extend their 3 months long tourist visas or more often would overstay their visas and would fall under irregular status. As result of this, while women remained "locked" within irregular market and life in Turkey, their husband or children were supposed to stay in Bulgaria and were not granted Turkish visas. Women who had to return to Bulgaria as result of emergency etc. had to pay high amount of fee to the migrant smugglers in order to avoid the 5-year long entry ban applied through a black seal to the passport, and high administrative fines that follow long-run visa overstays. Both options were rather expensive for families that could not meet the end. As result lots of children had to grow up separated from their mothers and left over to the grandparents in Bulgaria. Many separated families had to use smugglers' services as the last resort to bring their children to Turkey and reach family reunification.

Most of the Bulgarian Turks and Muslims could easily find jobs in Turkey, thus instead of returning to Bulgaria, they searched for ways to reunite with the rest of their families and especially their children. The most hard part of all this initiation was to bring children to Turkey, because they either did not have passports or could be brought to Turkey only accompanied by one of the parents or legal representative. For, the Turkish families who wanted to unite with their children had once again to use smuggler services. There is no data about the number of the smuggled children, but oral history stories provide information about the way

---

<sup>24</sup> Nurcan Özgür-Baklacıoğlu, "Türkiye-Bulgaristan Siyasetinde Sınırötesi Vatandaşlık ve Göç," 89 *Göçü: Bulgaristan'da 1984-89 Azınlık Politikaları ve Türkiye'ye Zorunlu Göç*. Ed. Neriman Ersoy-Hacısalıhoğlu ve Mehmet Hacısalıhoğlu (İstanbul: BALKAR&BALMED, 2012), s.470.

children were smuggled through the Bulgarian-Turkish borders. All this restrictive migration management and prevention policy and practice ended up into crossborder divided families, tragedies, pain and strengthened migrant smuggling networks and illegal crossborder market. Newspapers keep the news witnessing smuggled/trafficked children and child traffickers arrested at/across the Bulgaria-Turkey border.<sup>25</sup> Time to time news mentioned about wounded or dead children found in gas tanks, trucks and truck trailers, dangerous depots of buses or some cases, especially between 1995-1997.<sup>26</sup>

Some Bulgarian authors point to 350,000 Turks and Muslims who left Bulgaria and emigrated to Turkey between 1989 and 1993.<sup>27</sup> This number includes 250.000 Bulgarian Turks who were forced to leave the country in 1989 and found refugee and settled in Turkey. Other sources mention about 200,000 Turks and Pomaks that came to Turkey illegally between the years 1993-1996.<sup>28</sup> The real numbers probably exist in the archives of Turkey’s Ministry of Interior and Borders Gendarmerie. So far what we have in hand are the personal memories and stories of the smuggled children and their parents. Thousands of Turks and Muslims from Bulgaria had to live in Turkey as irregular immigrants for years, without any social security, retirement rights and health insurance, under the silent and merciful gaze of the local citizens and authorities. They were often accused of being favoured by the Turkish authorities, on the other hand indeed, they were exempted from work permit conditionality, each 5 years (during the election periods) they were benefitting from general amnesty to leave Turkey without administrative fines or return bans. Nevertheless, until 2001 they resided and worked in Turkey illegally.

All this crossborder turbulence kept going until July 1, 2001, when Turkey started to apply flexible visa regime and provided certain opportunities for legalisation via exemptions related to residence or/and employment permits, reasonable overstay charges, conditionality to exit and enter Turkey once in each three months or facilitation of legal employment. Turkey and Bulgaria had also accommodated dual citizenship that

---

<sup>25</sup> “Bulgarian police arrest people-smugglers”, *BBC News Online Europe*, March 7,1998.

<sup>26</sup> Nurcan Özgür-Baklacioğlu, “Cross Border Movements Across Turkish-Bulgarian Border: Problems and Prospects”, *Foundation for Middle East and Balkan Studies (OBIV): Turkish review of Middle East Studies*, vol. 8(2003), s.213

<sup>27</sup> Elena Marushiakova and Vesselin Popov, agm. , s.38.

<sup>28</sup> Didem Danış- Ayşe Parla, agm. , s.139.

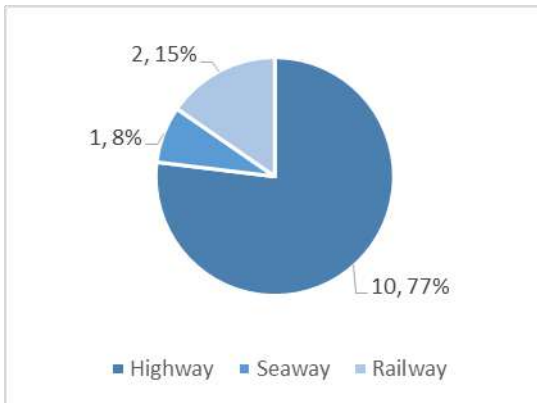


allowed the 1989 refugees to compensate their rights in Bulgaria as well as the right to retirement and health insurance while living across the Bulgaria- Turkey border.

### 3. Crossborder smuggling strategies and experiences through the eyes of the Turkish migrant children

The historical memory of the Bulgarian-Turkish border recorded numerous traumatic child migrations during the last century. Especially the last Ottoman century of war and conflict are full with tragic child refugee stories at both green and blue borders. Ottoman registers talk about unaccompanied children left alone during bloody conflicts and wars. Still not investigated but, Bulgarian-Turkish border observed the stories of child refugees running away to protect their life at one or other side of the border.

During the 1990's most of the Turkish children were being smuggled throughout the land borders, less cases talk about rail and sea routes. Most travelled by truck-truck trailer. Five of the interviewed children crossed the border together with family members other than their parents, such as grandmother, grandfather or elder brother, four of them crossed the border with one of their parents, and the other four children travelled with smugglers. In most cases they had to travel for hours smashed within narrow spaces among the goods and products at the depots of the trucks. During the long travels they had to avoid basic needs such as going to the toilet or eating. In many cases they were given pills before the border crossing in order to avoid any risk of kidnapping or fear-driven reactions.



*Figure 3: Border Crossing*

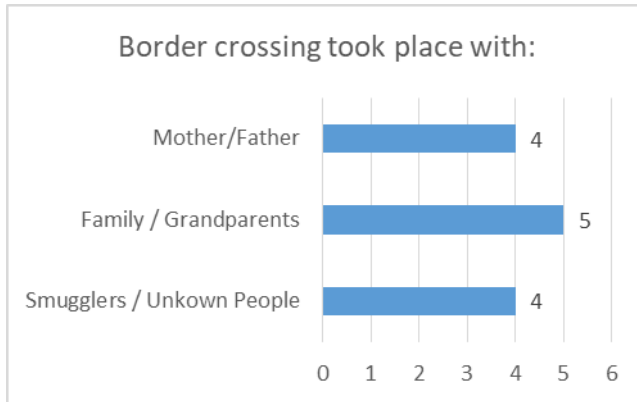


Figure 4: With Whom the Border is Crossed

Children felt more safe when travelling with their parents, while the hardest experience was the one with the smugglers. The 8 years old participant 13, shared her border crossing stories as following:

*“We came with my brother. My brother was 11 years old. My parents found 2 men. We set off from the village where I live with 4 people. My parents drove with us until the border in Edirne. We came to the border in the same car. On the Bulgarian side, they put another girl of my age in the car. While we were crossing the border by that car, the police followed us, our car accelerated and ran away. We landed at the edge of a forest. We get out of the car and run away to avoid getting caught. We crossed the border secretly by walking. There were wooden barriers in the forest. The man would open and then close them. I saw the cops, dogs were barking. We rested in the forest for a half an hour or 40 minutes. The man laid us down for a while. After crossing the border on foot, we entered a house near Edirne Selimiye Mosque. ”*

Participant 5 did not remember the border crossing exactly because she was 4 years old but said what she heard from her family. He crossed the border with a family he did not know at all, as if he was a child of another family with a fake passport. His mother and father were waiting him in Turkey at a certain point close to the border. Some of the migrants had to role play like someone whose residence permit was used during the border crossing. Often they had to pay a certain fee for this journey:

*“X’s father resided here (in Turkey) He had a residence permit and we pasted the picture of my daughter X on her residence permit. He took that child and went with my husband, and if they asked what your name was, X would say this name. We closed my daughters’ face with scarf,*

*hat, etc... That' s how she came, my daughter X. We paid 1000 dollars again to get all this done. We went after the border.'*

While role play-based smuggling strategy works better with the grown-up children, the most preferred smuggling method for smaller kids seems to be hiding in a truck or truck trailer. Participant 8 described her journey with the following statements:

*" I had crossed the border in a truck with 60 people, there were yarn boxes in the back of the truck. The driver was a Bulgarian who used to pass the border each 3 months. We were 60 people in his truck, we travelled within a space of half a meter (the size of a box). There was no box on the top shelf. We were sixty people there, it was lower than average human height. We bent over and sit. My daughter was 5 years old. Very small. They wanted to give medicine to my daughter, but I did not allow it. We gave 1000 marks per person. While we were getting on the truck, the driver unrolled the tarpaulin and put the ladder. He had a list, and he read the names of those who can climb into the truck. When we arrived at the border, the driver shouted, "Be quiet, we came to the border." They will hear it if you cough at that moment. Like the Şener Şen movie. "*

The smugglers developed various strategies and ordered tactics starting from the opening of the seal of the truck and putting it back in place without damaging it. The migrants were communicated about which side of the border are by the use of Bulgarian and Turkish music.

*"We went to the departure place in the morning, around 8 o'clock the man called us to his house. He pulled the truck alongside and opened the canvas in front of the house. There were 17 people in total. He slightly removed the seal of the truck, opened the canvas, there were boxes and goods inside, he created a space between the goods. Everybody got on the truck, put the rope back in place, put the seal back on. The man had put the goods in the truck aside. He left a space in the middle of the truck for us. 6 or 7 of the 17 people were older, the rest were children. One of them was 5 months old. The driver warned us several times to keep quiet, but the children were crying, wanted to go to the toilet, etc. They kept us there all the way. We stayed in that area for 16 hours. The truck was carrying textile products. We came bent over in a tiny space. There was a sack of sausage in the truck, everyone was very hungry, we ate them. As we approached the border, the 7-year-old boy started crying, they barely silenced. If it was summer, we wouldn't be able to stay in that tiny space. Because it is sealed, the truck never opens at the border. The smuggler learned to open it, took it off, lifted the tarpaulin. The man had mastered,*

*opened it and restored it. The people in the village saw this process in the center of the village. But nobody reported it to the police. "*

Some children were given pills or forced to sleep during the border crossing. One of the mothers stated that her child did not want to take medicine. Participant 12 remembered that she took medication but was caught at the border crossing:

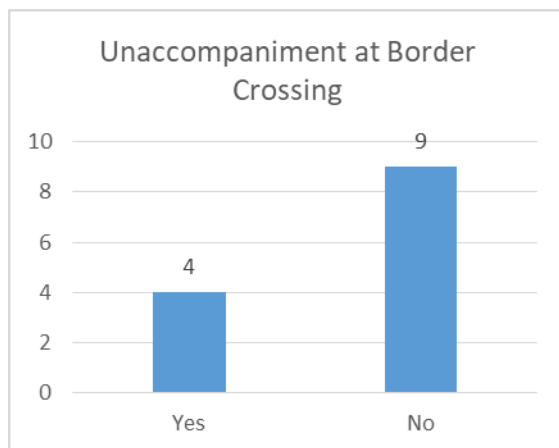
*"I had another experience a month or two before this experience. My family sent me on my own, but the smuggler was reported and we were caught at the border. It happened like this: We met with the smuggler in a park in Shumen. My family left me with them, I was very scared. There was another 13-year-old boy with the men, we got into the car. They gave us both a medicine, I guess it was calming. They opened the seat we were sitting in, there was a partition in it, they laid us there in that space with the other child, we were very stuck. However, we were caught because somebody complained about the driver and the officers opened the seat and found us. I started crying. They asked me questions. Then they called our village chief. I waited there for 4-5 hours at the border. Then the mother of the other child took both of us and we went to Shumen. That night I stayed at the smugglers' house. The next day my mom took me. My parents gave 2500 marks to the smugglers, it was valuable money at the time, but they didn't return our money back. "*

Most of the respondents paid over 1000 German Marks for each child smuggled. There were various methods for crossing the border illegally: by walking, hiding in the car trunk, hiding on the train and on the ship. Smugglers were increasing the prices according to the financial situation of the family. One mother said:

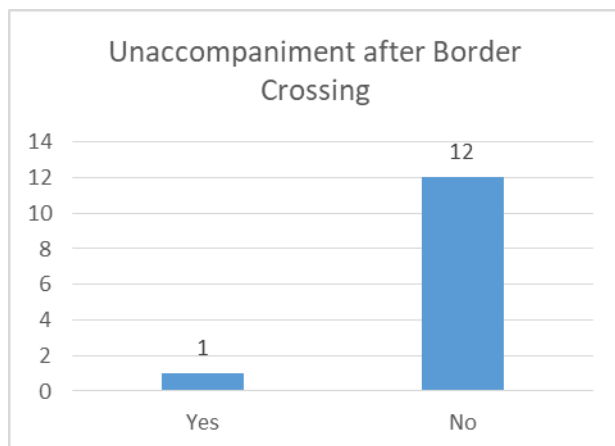
*"I felt like I bought my children for 3 thousand Marks, in order to meet them. I handed them over to people I did not know at all. All was dangerous. After one month, visa liberalisation came and border gates were opened and my money were basically wasted for nothing. "*

Indeed, visa restrictions and preventive migration policies not only placed numerous children and people under risk and danger, but also wasted and directed huge amount of money towards the smuggling networks and black market. In other words thousands of savings were spent for boosting illegality and crimes. The border crossing contained numerous dangers especially for the children who had to cross the border without their parents or relatives. Indeed, the stories tell that the rate of the children who travelled alone was considerable.

Four of the interviewed participants passed Bulgarian-Turkish border unaccompanied, i.e. without their parents or a legal representative. One of our male respondents, was 17 years old and followed the whole journey alone before, during and after the border crossing.



*Figure 5: Unaccompaniment at border crossing*



*Figure 6: Unaccompaniment after border crossing*

Most of the children and parents were caught in the middle of a hard choice: to continue to live as a divided family and undertake all its troubles and pain, or to use smugglers' services and reunite for a better life. Most of the parents wanted their children to continue their education in Turkey, instead in Bulgaria. As participant 13 reveals:

*"They were left without a mother and father like orphans. My children were telling those who were going to come here (Turkey) 'take me to my mother and father'. They were telling them: 'I will enter the sack and I will not make a sound when we cross the border. They missed their parents a lot. "*

Children who grow up apart from their families or who lived separately from them for a while, who undergone divided families, expressed a feeling of inadequateness. Participant 2 grew up separated from his family:

*"Being separated from my mother and father for 5 years was of course very difficult spiritually, but my grandmother and grandfather provided me with every opportunity, I was not deprived of anything. But maybe if we hadn't immigrated here and stayed there, I could have been a police officer. My biggest dream was to become a cop. I could not become a cop here because I was granted Turkish citizenship as a second citizenship. Because when we applied for citizenship with my mother and father, I was younger than 18, but my application was cancelled because I turned 18 during the waiting period, my parents were able to become citizens while I got my citizenship very recently because I arrived later."*

About 12 participants stated that there was no divided family or single parenting after the border crossing.

*"I had a hard time, my passport was in someone else's hand, the Bulgarian trainer had it. We took it from him. We got stuck at the Bulgarian border, the Bulgarian border guards didn't want to leave us. They kept us closed in a dark room for 5-6 hours. One man helped me and I found myself hiding in the trunk of a car. I succeed to cross the border and I said that if I am going to die, I will die at my own homeland. The police could not apprehend me. In Turkey I lived alone. I was always alone.. I was sad, of course. Loneliness is difficult, but if you want to build up your own life, you have to come somewhere and prove yourself."*

Almost all of the smuggled children interviewed during our field research succeed to cope with the traumas and fears hidden in their crossborder memories. They had to cope with the difficulties to live under irregular status in Turkey and faced numerous difficulties during their settlement, integration and citizenship application in Turkey. All of them build up legal and reasonable lives together with their families thanks to the illegality itself. All of them undergone difficult moments and still feel fears while recalling the border memories. Nevertheless, as respondent-8 says, they went throughout a story that resembles Şener Şen's comedy.

This comic illustration and simplification of the whole story, actually points to the lack of reason and vivid imprudence of the prevailing migration control and border security policies, that unfortunately led and today is leading to the death of hundreds of refugee and migrant children leading for the European lands.

### **Conclusion: The human impact of restrictive visa policies and border controls**

The available data and academic research had already proved that nationalist solutions and security-based visa regimes and border policies are neither effective nor sustainable options for preventing crossborder migrant movements. They prevent legal crossborder mobility, but set up dangerous and expensive trajectories for illegal passages and smuggling, corruption and black market at crossborder regions. While the financial and human cost of border passages for the average migrants and refugees increased to devastating levels, the actors that benefited the most from all these restrictive practices were the smugglers/traffickers and black market employers who exploited the illegalised migrant labour. Restrictive visa policies force average migrants to accept illegal services and solutions, thus drags innocent people into the arms of the black market. The restrictive visa policies and structural push factors (unemployment and economic discrimination) forced numerous Bulgarian Turks and Muslims to break the laws and live and work “illegally” in Turkey, squeezed between the merciful gaze of the administrative authorities, nationalist expectations of loyalty expressed by the nationalist parties and negative prejudices of the radical left-wing opposition in Turkey.

It is well known that some Turkish governments and MRF had spent valuable efforts to develop sustainable solutions for expanding employment in the minority populated regions. Turkish and minority authorities were well aware that the main reason for emigration were of economic nature combined with populist instrumentalization and ethnic discrimination and party patronages. For example, Turkey and DEİK at that time, placed efforts to encourage Turkish companies to invest in minority populated regions in Bulgaria. Some big investments succeed to settle in Bulgaria during the MRF participation at the government in the late 1990 and beginning of 2000's, but they remained limited. Turkey also initiated some investment loans but they were approached by suspicion by the Bulgarian authorities.<sup>29</sup>

---

<sup>29</sup> Ali Dayıoğlu, *age.* , s.473-474.

Populist discourse and patronage networks never lost any opportunity to instrumentalize the so called “Turkish card” and question any international support or EU fund for development to be invested at the minority-populated regions. Thus basically, the populist exploitation of the ethnic identities and life privacy, the ethno-economic discrimination and lack of perspective for a bright future forced thousands of Turks and Muslims from Bulgaria to emigrate to Turkey or later on, after 2007 to the EU member states. Turkey’s visa regime has never been so liberal as today, but the Bulgarian Turks and Muslim do not emigrate to Turkey, but to the EU countries. Thousands of the 1989 refugees got their retirements and returned back to spent their last years at their fatherland Bulgaria, while others live on seasonal shift across Turkish-Bulgarian border and follow the seasonal migration paths of the birds, i.e. in the spring go to Bulgaria, in December return to Turkey.

Tired of their shifting dual identities and belonging, they somehow managed to settle in between no-where across the Bulgarian-Turkish border. The smuggled children grow up, completed graduate education, succeed to build reasonable and legal lives by leaving their bad memories to the dark pages of the history. The separated families managed to overcome the restrictive visa and border security policies by undertaking hard and expensive risks in some cases deep pain. Almost all made true their dreams for family reunification, they succeed regularize their life at the Turkish side of the border and overcome the discrimination and structural violence in Bulgaria. Most have dual citizenship and still cross the Bulgarian-Turkish border using binary identities, speaking two different languages, easily adapting to two different cultures and languages. Most of them express the role of education as the saving path that provide them opportunity to dream for better future even under irregular status. Education gave them opportunity for vertical societal and professional progress. Although awkward, some think that their families have been reunited thanks to the smuggling: “Fortunately, these options existed and our family did not fall apart.”

Nevertheless, they are aware that they undergone dangerous experiences, they feel inadequate and sad, one of the children suffered from epilepsy because she was caught at the border during illegal crossing. Smuggling process itself involves various risks for children who cross borders illegally. The number of the children who do not succeed to cross the borders alive is still unknown. But what is clearly well experimented and known so far, is that, restrictive and security-based visa, migration and border policies may interrupt legal migration, but strenghten illegal



migration and force innocent people into arms of human trafficking and social discrimination at the black market.

### Bibliography:

“Bulgarian police arrest people-smugglers”, *BBC News Online Europe*, March 7, 1998.

**Çeçen, Berrak.** “Bulgaristan’dan Türkiye’ye Gelen Düzensiz Göçmenlerin Yasallaşma Süreçlerinde Değişen Yasal Düzenlemelerin Rolü”, *İstanbul Ticaret Üniversitesi Sosyal Bilimler Dergisi*, vol. 29/2 (2016), s. 265-282.

Columbia University. “Forced Migration Learning Module”. Erişim 30 Eylül 2019.

<http://www.columbia.edu/itc/hs/pubhealth/modules/forcedMigration/definitions.html>.,

**Danış, Didem, Ayşe Parla.** “Nafile Soydaşlık: Irak ve Bulgaristan Türkleri örneğinde göçmen, dernek ve devlet”, *Toplum ve Bilim*, vol. 114 (2009), s. 131-158.

**Dayıoğlu, Ali.** *Toplama Kampından Meclis’e: Bulgaristan’da Türk ve Müslüman Azınlığı*, İstanbul: İletişim Yayınları, 2005

**Ensor, Marisa O.** *Children and forced migration*. New York, NY: Springer Berlin Heidelberg, 2016.

EU, “Approaches to Unaccompanied Minors Following Status Determination in the EU plus Norway”. Synthes Report. European Migration Network, Temmuz 2019.

Garin, Emily, Jan Beise, Lucia Hug, Danzhen You, ve UNICEF. *Uprooted: The Growing Crisis for Refugee and Migrant Children*, 2016.

**Gürle, N. Şule.** “İstanbul’da Refakatsiz Sığınmacı ve Mülteci Çocukların Karşılaştıkları Sorunlar ve Uygulamalar”. Yüksek Lisans Tezi, İstanbul Üniversitesi, 2012.

**Grover, S. C.** *Child refugee asylum as a basic human right: selected case law on state resistance*. New York, NY: Springer Berlin Heidelberg, 2018.

Harvard University. “Emergency Within an Emergency: The Growing Epidemic of Sexual Exploitation and Abuse of Migrant Children in Greece”. Harvard University, 2015.

EU Committee. “Children in crisis: unaccompanied migrant children in the EU”, House of Lords, 2016.

IOM. *Glossary on Migration*. International Organization for Migration, 2019.

IOM. *Göç Terimleri Sözlüğü*. Uluslararası Göç Örgütü, 2009.

**Marushiakova, Elena and Vesselin Popov.** “Muslim Minorities in Bulgaria.” Paper presented at the conference Migration and Political Intervention: Diasporas in Transition Countries, Berlin: Parabolis, 2004.

**Nuray, Sezgin.** *Soğuk Savaş Sonrası Değişen Uluslararası Sistemde Türkiye-Bulgaristan İlişkileri*, Yüksek Lisans Tezi, Uludağ Üniversitesi, 2001.

**Özgür-Baklacioğlu, Nurcan.** “Cross Border Movements Across Turkish-Bulgarian Border: Problems and Prospects”, *Foundation for Middle East and Balkan Studies (OBIV): Turkish review of Middle East Studies*, vol. 8(2003), s.202-226

**Özgür-Baklacioğlu, Nurcan.** “Türkiye-Bulgaristan Siyasetinde Sınırötesi Vatandaşlık ve Göç.” *89 Göçü: Bulgaristan’da 1984-89 Azınlık Politikaları ve Türkiye’ye Zorunlu Göç*, Ed. Neriman Ersoy-Hacısalihioğlu ve Mehmet Hacısalihioğlu, 343-369. İstanbul: BALKAR&BALMED, 2012.

**Özlem, Kader.** *Soğuk Savaş Sonrası Dönem Türk-Bulgar İlişkilerinde Türk Azınlığın Durumu*, Yüksek Lisans Tezi, Uludağ Üniversitesi, 2010.

**Rüma, Ş. İnan.** “Kalanlara Ne Oldu? Bulgaristan’da Azınlık Haklarının Gelişiminde AB Genişlemesinin Etkisi.” 89 *Göçü: Bulgaristan’da 1984-89 Azınlık Politikaları ve Türkiye’ye Zorunlu Göç*, Ed. Neriman Ersoy-Hacısalihioğlu ve Mehmet Hacısalihioğlu, 459-492. İstanbul: BALKAR&BALMED, 2012.

**Sancaktar, Caner.** “Balkanlar’da Devletçi Sosyalizmden Kapitalizme Geçiş: Arnavutluk, Bulgaristan ve Romanya”, *Balkan ve Yakın Doğu Sosyal Bilimler Dergisi*, vol.05/02 (2019), s.56-64.

**Salmerón-Manzano, Esther, ve Francisco Manzano-Agugliaro.**

“Unaccompanied Minors: Worldwide Research Perspectives”. *Publications* 7, sy 1 (28 Aralık 2018): 2. <https://doi.org/10.3390/publications7010002>.

**Sedmak, Mateja, Birgit Sauer, ve Barbara Gornik,** ed. *Unaccompanied children in European migration and asylum practices: in whose best interests?* Routledge research in asylum, migration and refugee law. London ; New York, NY: Routledge, 2018.

**Uluslararası Kızılhaç Komitesi.** “Refakatsiz ve Ailesinden Ayrı Düşmüş Çocuklar’a İlişkin Kurumlararası Rehber İlkeler”. International Red Cross Comitte, 2014.

<http://www.unicef.org.tr/files/bilgimerkezi/doc/REFAKATS%C4%B0Z%20ve%20A%C4%B0LES%C4%B0NDEN%20AYRI%20D%C3%9C%C5%9EM%C3%9C%C5%9E%20%C3%87OCUKLAR.pdf>.

**UNHCR.** “Global Trends: Forced Displacement in 2018”. The UN Refugee Agency, 2018. <https://www.unhcr.org/5d08d7ee7.pdf>

*Андроника Мъртонова*  
*Българска академия на науките*

*Andronika Mårtonova*  
*Bulgarian Academy of Sciences, Institute of Art Studies*  
*[andronika.martonova@gmail.com]*

## **Бежанците и съвременното българско кино – проблеми и модели на представянето**

**Abstract:** *The onset of the migrant crisis has caused the appearance of new works in the European cinema but Bulgaria has been lagging behind with the articulation of the ‘refugee’ theme. The figure of the foreigner does exist on our contemporary movie screen but the emphasis usually falls on the rethinking of the traumatic totalitarian past. There are, however, directors who are developing the socially engaged cinema and searching for different approaches to the study of the Other/the Alien. Unavoidably, these cinematic works tie in xenophobia, the hardened monocultural mentality, the widespread national disillusionment with the perpetual transition and the feeding of marginalization within the EU. The first short documentaries appeared in 2006 thanks to the initiative of The Red House Centre for Culture and Debate which no longer exists in Sofia. The so-called Invisible Minorities package comprises five titles. The authors of these films do not belong to the professional cinema community but they have managed to provoke a discussion. Recently several mature and young directors summoned the courage to discuss the image of the refugee, sending various messages to the audience (local and international). With the aid of the film studies toolbox – but within the contexts of the socio-cultural environment I have analyzed the documentaries Long Live Bulgaria (2017, by Adela Peeva) and The Good Postman (2016, by Tonislav Hristov); the shorts - Trials (2017, by Boya Harizanova) and Dobry (2017, by Orlin Milchev); and the feature film Fear (2020, by Ivaylo Hristov).*

**Key words:** *Bulgarian cinema; migrant/refugee crisis; xenophobia; social criticism; narrative models*

През вече далечната 2005 г. Центърът за култура и дебат „Червената къща“ обяви конкурс за нискобюджетни документални филми. Темата – мигранти и бежанци в България. Форматът бе напълно отворен, даже нямаше изисквания за ценз в кинорежисурата, и като

че ли се търсеха автори от различни хуманитарни направления, които за първи път да покажат на екран болезнените истории на хората. Това бе по-важното на този пионерски етап – да се започне дискусия и да се наложи видимост на съдържанието, отколкото да се търси естетическият потенциал във формата. Както отбелязва и Зелма Алмалех по страниците на сп. „Кино“: *„Добрият документален филм е покана за размисъл – ако имаме чувствителност”* (2006, р. 32).

Цялото събитие бе наречено *„Невидимите малцинства”* (Фестивал на новите мигрантски общности от Близкия Изток, Азия и Африка в България. Филми, изложби, музика) и се проведе в края на март 2006 г. Съдбите и проблемът за ксенофобията бяха основните теми във филмите, реализирани без много претенции за художественост. Сюжети: портрети на ливанеца Мазен Хадад и иранеца Махди Сафар; истории за мултикултурализма и чудаците – космополити от цяла Европа; очертанятия на расизма през погледа на трима африканци – от Камерун, Нигерия и Конго; видимите и невидими лица на китайската общност у нас<sup>1</sup>. Едно много добро начало, което е особено важно, защото в културното ни, медийното ни и в частност филмово пространство и досега (15 години по-късно!) проблемите на мигрантите и бежанците у нас присъстват спорадично. Няма да е пресилено ако кажем, че са рискова и чувствителна територия, защото провокират и негативни реакции в определени кръгове на обществото, от типа: *„българите имат достатъчно проблеми, не ни стигат циганите, а сега и с тия ли ще се занимаваме”* – типична реч на омразата, която е експонирана и в някои филмовите творби, които ще разгледаме по-нататък в текста. Показателно е, че по време на прожекциите глас от публиката казва, че благодарение на показаните филми става ясно, че у нас има расизъм (Недева, 2006). А преди това темата сякаш бе табуирана и negliжирана.

Като цяло киносредата у нас страда от сюжетни дефицити от различен порядък. Един от тях е тематичният кръг свързан с традиционно представените у нас етнически малцинства, които са *„неизменно оцетени”* (Александрова, 2012, р. 21) на екрана. Към тях сега трябва да прибавим и образите на мигрантите и бежанците. Обръщането на кинематографистите към цялата тази група на *Чуждия/Другия* обаче е процес, който рано или късно трябва да се случи,

<sup>1</sup> Повече по темата виж: Недева, 2006; Алмалех, 2006, р. 32-34; Мартонова, 2020, р. 171-198.

защото ни води към демократизиране на киното ни (а оттам и на погледа на публиките) и „в наш интерес е да ги демонстрираме” (пак там, р. 22).

За жалост, фестивалът „Невидимите малцинства” май остана еднократен акт. Центърът за култура и дебат „Червената къща” уви вече го няма и неговата липса в културното ни пространство се усеща. Истинско приключение е да се добереш до архивния фонд и филмите, които повече клонят към социалната антропология и публицистиката, отколкото към концепциите на седмото изкуство в смисъла на „голяма документалистика” и критериите за постижения в киното. Но все пак са си важен първи опит в екранното артикулиране на образа на съвременния, *Милениум бежанец*.

В настоящата статия ще се фокусираме именно върху моделите на представяне и проблемите, разисквани около темата за бежанците, възпътени в определени, малко на брой образци на посттоталитарното ни кино (документално, игрално – късо- и пълнометражно). Налага се да уточним, че сега ще бъде проследен векторът на центростремително движение, отвън-навътре – тоест как филмовото ни изкуство обговаря влезлия в страната ни *Друг/Пришълецът субект на бежанската криза и ефектите на ксенофобията в XXI в.*, особено в заглавия, появили се през последните години. Трябва да подчертаем, че опитът на съвременното ни екранно изкуство с бежанците като основни персонажи е прохождащ. В повечето творби те са второстепенни двигатели на сюжетното действие или епизодици. Като примери за това можем да дадем със „*Съдилището*” (2014) на Стефан Командарев (където за първи път се появяват в игралното ни пълнометражно кино), и във функцията на епизод – с „*Пътуващо кино*” (2019) на Илия Костов<sup>2</sup>.

---

<sup>2</sup> „*Съдилището*” преосмисля травматичното минало и изследва последиците от лицемерните престъпления на властта. Бежанците са от два хронотопа – бившата ГДР в миналото, и Близкия Изток – от сегашното време. Акцентът е върху мигрантската криза, подчинен на портрета на нескончаемия български преход и катадневно оцеляване (виж **Martonova, A., 2020b**). Епизодичният казус с „*Пътуващо кино*” е различен – там бежанците са употребени, за да обслужат локалната битова комедия и да се вляят в общата кинематографичната логорея, която пак проявява на екран абсурдното ни битие. На мигрантите в бежански лагер им се прожектира „*Козият рог*” (!) и им се обяснява с патос историята на турското робство. Уви епизодът, както и целият филм демонстрира лош вкус. Жалко за актьорите като Катерина Евро, Любен Чаталов, Юрий Ангелов, които са употребени като „*мечки*” – разпознаваеми, но станали носители на пошлото

Опитът с изобразяването на бежанците не се основава на натрупвания в соцкинематографията ни, където фундаменталната тема бе да се затвърждава правилността на идеологията. До 1989 г. в българското кино реално няма бежанци в съвременното значение – хора, които са напуснали родината си заради войни, размирици, политически преследвания и пр. Ако подобни персонажи се появяват, те са в официална синергия с политическата ориентация и доктрина и са бутиков обект на пропагандната документалистика<sup>3</sup>. Чужденецът – западняк, доминиращо е представен като идеологически враг. Идващият човек от т.нар страни с народна демокрация (комунистическия блок) обаче е окичен с друг, приемлив за системата ореол.

След 1989 г. целта на българското кино е да се реформира, преминавайки в условията на пазарно кинопроизводство. Една от водещите теми е свързана с осмисляне на тоталитарното ни минало. Гергана Дончева (2016, р. 29-31) много точно подчертава, че чужденецът в новото ни кино се появява на екран, тясно свързан с репозиционирането на страната в мрачния европейски ъгъл и желанието на авторите през неговия образ да изградят национална самокритика, както на болезненото минало, но и така на прехода. Махалото на дихотомията „свой- чужд“ се разлюлява по различен начин и с различна интензивност при обговарянето на стереотипите. Оказва се, че има чужденци, които са по-чужди от чуждите и съответно по-свои (както от чуждите, но така и от своите!). Най-голямото предизвикателство пред сценаристите и режисьорите е да изграждат на екрана универсални, общочовешки послания, чрез които да се заличава шаблонното противопоставяне на националните характеристики.

След 2010 г. и появата на „*Мисия Лондон*“ на Димитър Митовски се наблюдава своеобразен вододел. Появиха се нови автори и нови теми, които много повече се интересуват от съвременния човек (въобще), а и самото ни кино придоби някак по-европейски облик. Появи се образът на *мигриращия човек*. Много повече се изследва

---

чувство за хумор. (По повод на „*мечките*“ в съвременната култура на смеха виж Spassova-Dikova, 2017, р. 175-184)

<sup>3</sup> Например „*Те са и наши деца*“ (1952 г.) – филм за живота на корейските деца, намерили подслон в България след бомбардировките в Северна Корея, с режисьор Борис Милев и оператор Жеко Русев. Децата са хем в ипостаса на бежанци, хем официално приети. Различността на расата в никакъв случай не провокира ксенофобска реч на омразата, точно обратното и това ясно си личи и от заглавието на творбата.

обаче българинът зад граница, или стремежът, копнежът към чужбина, отколкото да се артикулират проблемите и сблъсъците на иностранците с българите у нас. Получи се и любопитен феномен – дългогодишно считаното за по-силно в разглежданото в социалната проблематика документално българско кино, според някои изследователи, отстъпи пред игралното, което се оказа доста почувствително към темите на деня<sup>4</sup>. Все пак „важните филми” в документалистиката ги има. Те визуализират нееднозначно болезнените, пулсиращи точки на българското битие. Битие, което още повече се нажежава и възплавява, когато в него се включат и бежанските проблеми.

С настъпването на бежанската криза източноевропейските страни станаха едновременно източник на мигранти, но и приемаща страна. Според Гуидо Рингс благодарение на мигрантския взрив културният европейски монолит, в смисъла на хомогенна кинематографична същност, вече не съществува (Rings, 2016, p. 17). Европейското, в частност българското, кино сега е изправено пред следните въпроси: *справят ли се съвременните филми с етническите и дискриминационни стереотипи? Конкурират ли се различните модели на изобразяване на мигранта/бежанеца и чрез излъчените послания кои позиции се подкрепят – националистичните или глобалистичните? Как киното разглежда ролята на Европа в състоянието на транскултурна модерност и постоянно променящи се миграции и диаспори?* Отговорите обаче раждат и парадокс: опитът за налагане на разбиране и преодоляване на културните различия всъщност подчертава именно различията и усилва ефекта на дихотомията „те” и „нас”.

Монокултурният манталитет разширява социалната пропаст и активира допълнително националистичните и ксенофобските нагласи<sup>5</sup>. И това е много видно в един конкретен пример от българското кино – документалния филм на Адела Пеева „*Да живее България*” (2017).

Криворазбраният патриотизъм, стигащ до краен национализъм, дори фашизъм и зверска расова омраза са основата на творбата. Без да заема позиция (тук ще се съгласим с раздражението на коле-

---

<sup>4</sup> Виж при Донеv 2020, p. 46-52.

<sup>5</sup> Виж и изследването за ксенофобията в екранното творчество: Мечков, 2015, 169-201.

гата Деян Статулов за това нейно решение<sup>6</sup>) режисьорката прави документално наблюдение върху подобрани групи в Стара Загора, Пловдив и София. Има всякакви странни лица в този филм, карнавалният пачуърк на портретите е повече от зловещ. Но най-тревожен е тийнейджърът-ученик, който пред блесналия поглед на учителите, и на всичко отгоре пред съученици от друга етническа общност, заявяват непоколебимо: „ромите не трябва да празнуват националния празник 3 март, защото са чужденци и са основният проблем на България; благодарение на чужденците (в това определени влизат цигани, турци, бежанци, мюсюлмани – бел. авт.) скоро ще се разрази етническа война в страната ни; Господ е този, който е определил земите на народите и затова бежанците да си стоят в Арабия, а да не идват тук”<sup>7</sup>. От своя страна учителките защитават невръстния „месия” на криворазбрания патриотизъм и го обявяват за гений. Ето го кривото огледало на действителността ни. Единствената нишка на сблъсък в „Да живее България” е между благотворителна организация, която помага на бежанците, и нахъсаните легионери. Но тази конфронтация е само в два кратки епизода. Фигурата на бежанеца остава в щриха на „въобразен враг” и обликът му се размива в общия стереотипен „гювеч”, в който попадат всички останали. Бежанецът е само мимолетно обговорен в съпоставянето на двете противоположни групи и е малка част от инструментариума за извеждане на широка палитра от болезнени истини за обществото ни. Всъщност много по-алармиращ като послание можеше да стане филмът на Адела Пеева. Някак не му достига онази категорична енергия, която да го извади от познатото и да повиши чувствителността към подтемите, които носят достатъчно потенциал за развитие.

Друго документално заглавие докосва темата за ксенофобията, без да я преекспонира. Даже напротив – тя е деликатен тлеещ фон,

<sup>6</sup> „Възрожденският лозунг, използван като заглавие на филма, не стига да оправдае както намеренията на Адела Пеева (които остават неясни), така и зрителските очаквания. Режисьорът и автор на филма отказва да изследва темата. Стои като безучастен и безмълвен зрител, който няма концепция. /.../ Адела Пеева не търси различни гледни точки и причинно-следствени връзки и дълбочина на визуалния коментар, която изисква избраната тема. Затова и филмът стои едностранен и плитък.” (Статулов, 2018, р. 12 -13).

<sup>7</sup> Отреденият от Господ дял за народите е силно застъпен в българският фолклор – той е етнодиференциращ и определя емблематичния народностен характер. Виж Георгиева 2003.



на който се разиграват други значими социални теми. Става въпрос за „Пощальонът“ (2016)<sup>8</sup> на Тонислав Христов. Действието се развива в село Голям Дервент по границата с Турция<sup>9</sup>, входна врата и за бежанците. В кампанията за местни избори се конфронтират два тотално противоположни персонажа – добрият пощальон Иван и „Черния“, приличащ на уморен и забравен рокер комунист. Иван иска да спаси селото от обезлюдяване и предлага на малкото останали старци в селото алтернатива: така и така повечето помагат на бежанците, защо пък да не ги приютят и заселят трайно. Така Голям Дервент ще живне: ще има работна ръка, ще има млади хора, деца, училището и читалището отново ще заработят. Някои от селяните са напълно съгласни, но не и „Черния“, който води кампания за затваряне на границата и активно промотира връщането на комунизма. В крайна сметка нито един от двамата не печели местните избори – странно как (а може би не съвсем) латентната и незаинтересованата за бъдещето и съдбата на селище кметица Вера взема втори мандат. А бежанците? Основно са обговорени, витаят през целия филм много повече като катализатор на човечността, отколкото на дискриминацията, която я има, разбира се, но не се разразява изпепеляващият ксенофобски огън. Реално в „Пощальонът“ те се появяват замалко, и то в две разнородни аудиовизуални решения: 1) в архивни кадри – показващи заловен трафикантски камион на границата, пълен със задушени, мъртви тела на мигрантите; 2) във вметнати игрални епизоди, за което Тонислав Христов бе упрекуван, че нарушава конвенциите на документалистиката. Но този хибриден ход е всъщност много удачен, защото подчертава цялата значимост на разказа. Няма манипулация, а смислов акцент. Особено силен е сегментът, когато Иван и Черния се обединяват, палят колата и закарват до града майка (от бежанците) с детенцето ѝ. А в паралелен монтаж вървят архивните кадри на смъртоносния камион... Всъщност авторът извежда много майсторски два корпуса-теми: за емпатията и самотата, за надмогването на страха и различията. Моделът на представяне на бежанците, именно чрез минимализъм, се оказва повече от работещ. Техните сенки помиряват, смирят и променят гледните

<sup>8</sup> Филмът е с номинация за най-добър документален филм на Европейските филмови награди и в Сънданс. Получи и „Златен Ритон“ на националния форум за най-добро документално и анимационно кино в Пловдив`2017.

<sup>9</sup> Темата за южната ни граница в българското кино е много интересно развита при Александрова, 2021.

точки на персонажите за добро, особено що се отнася до кандидат-кмета комунист<sup>10</sup>. В крайна сметка „Пощальонът” е изключително човечен и топъл филм, без да натрапва позиции. И не на последно място – пълен с надежда. И както казва режисьорът в едно свое интервю: *„Моето кино по някакъв начин е с източноевропейска душевност, но с инструментите на скандинавското кино. /.../ Имало е различни причини, заради които съм тръгвал да правя филм, но обикновено е заради нещо, което не е правилно и хората трябва да помислят върху него. Липсата на емпатия към бежанците ме накара да почна да работя по „Пощальонът“.* (Канушева, 2019, р. 116)

За морала, избора и ценностите – така можем да синтезираме силния и стилизиран късометражен филм - „Изпит” (2017) на Боя Харизанова. Драматургията поставя бежанците в съвсем друга ситуация: в уседналост, интеграция и надежда за рестарт на живота. Румен (Халед Канхуш<sup>11</sup>) е от смесен произход – бащата е българин, а майката е убита в Сирия. Младият мъж се готви за приеман изпит в полицейската академия, води тренировки по бойни изкуства за деца, има си българска приятелска компания, радетел е на ненасилето. Накратко – симпатяга и целеустремено, свястно момче. Два дни преди конкурса е въвличен в тежка разпра между най-добрия си приятел и сирийци, които работят в съседния ресторант. Чия страна ще заеме Румен и как ще разреши и вътрешните си конфликти? Същевременно общественият фон е нагнетен – вървят репортажите за бунта срещу затворения режим в бежанския лагер в Харманли през ноември 2016. Предразсъдъците, ксенофобията и речта на омразата мигновено изригват: *„Животни, да си отиват там – в Афганистан, в Иран...”*; *„мамичката ти камиларска арабска”*; *„чалми, талибани, арабско копеле”*. Тези познати шаблони констатират на друг тип, иносказателни реплики, които малко декларативно биват изказани от Карим (Тамаш Хаким) и Джабер (Язан Хаким) – мигрантите в ресторанта, но пък придават друг тип притчовост на филма: *„Когато знаеш кой си, няма значение кой е другият. Когато*

<sup>10</sup> Тонислав Христов в момента работи върху продължение на „Пощальонът”. Проектът е игрален, с работно заглавие „Добрят шофьор” и е за живота на Черния комунист от село Голям Дервент.

<sup>11</sup> Всички сирийци, които участват във филма, са натуршчици. Като режисьор Боя Харизанова ги води великолепно, няма грам фалш, преиграване или декламация. И това е много добър професионален подход, защото образите седят абсолютно автентично на екран.

знаеш къде отиваш, няма значение кой идва срещу теб”; „Избягах от войната, но войната е навсякъде. Войната е вътре в хората”; „Всеки е бежанец и всеки един бяга от нещо.” Определено „Изпит” си поставя съвсем друга задача, което го отличава: да стигне до общочовешкото, да се фокусира върху изкуствените разделения. Имаме и смяна на гледната точка с избора на протагонист и заявяване на социално ангажирано кино с много сериозно премислени послания, отправени към една по-универсална и млада публика. Това ще видим и в останалите два игрални примера: „Добри” (2016, късометражен) на Орлин Милчев и „Страх” (2020, пълнометражен)<sup>12</sup> на Ивайло Христов.

„Немотивираната неприязън и смътното усещане за заплаха заради различността” (Александрова 2019, р.177) – са основните двигатели и в двете, също много качествени творби. А общият знаменател е отново страхът, който отравя посредствената, но сигурна зона на марганилизирания комфорт. Константа, властваща в селските кръчми, където микрополитиката е доминирана от неизменния монокултурен манталитет.

„Добри” и „Страх” са много сходни във фабулната си концепция, като оформят своеобразен, вторичен „триъгълник на влиянието” със „Страх изяжда душата” (1974) на Райнер Вернер Фасбиндер. Векторите на комуникацията между трите филма е различна. Схемата на „Добри” е много видима в „Страх” – появата на цветнокож мигрант в микрообществото на затънтеното, отново погранично село. Бежанецът Дямба, прекръстен на Добри (в ролята е Лалин Мамба<sup>13</sup>), бива приютен от Дядо Кольо (Йордан Петков) и това провокира тотална безчовечност и агресия. Персонажът Бамба от филма на Ивайло Христов е също от Мали (в ролята е Майкъл Флеминг<sup>14</sup>). Но разказът в „Страх” стъпва и върху немската творба, особено с експонирането на любовната връзка между Бамба и безработната учителка Светла (Светлана Янчева). Общата формула, взаимствана от Фасбиндер, не е само в наративната схема, а и в иде-

<sup>12</sup> Филмът получи националния приз „Златна роза” за най-добър игрален филм във Варна`2020. За ситуирането му в рамката на годишната ни филмова продукция, дискуссионното поле на страха и позициите на режисьора Ивайло Христов и продуцента Асен Владимиров виж анализите и интервютата на Дончева, 2021, р.20 -25. Драганов, 2020, р.48-53; Статулов 2020 и 2020б.

<sup>13</sup> Натуришчик, реален мигрант от Мали и в живота, и във фикцията.

<sup>14</sup> Афроамериканец, професионален музикант, добре познат на българската публика, епизодик и в други български филми.

ята персонажите на мигрантите да послужат като разтърсващ критичен лакмус за болезнените проблеми на социума<sup>15</sup>. Режисьорските подходи на Милчев и Христов също са различни и определят жанровата поанта: „Добри” е силно трагичен, докато „Страх” е балканска трагикомедия, естетски реализирана в черно-бяла визия и със светъл финал на надеждата. В диалозите и на двата филма са обиграни и всички възможни шаблони от ксенофобската палитра, която се шири във форумите, социалните мрежи, посланията на ултранационалистите. От „Бежанци и такива черни тука не ни трябват!” („Добри”) до „Не ми стигат мангалите, тя и негри ще ми води!” („Страх”).

Можем ли да бъдем щастливи в една настъпваща мултикултурна среда? От какво се страхуваме? Защо непрекъснато поставяме бариери и търсим негативната страна на различието? Развенчано ли е прословутото българско гостоприемство и защо не се безпокоим, че се „излагаме пред чужденците”, когато иде реч за мигрантите и бежанците? Защо българинът няма да стане скоро гражданин на света? Това са основните въпроси, върху които все повече български киноавтори ще разсъждават на екрана и занапред. Определено виждаме етап на смяна на мисловните конструкции във филмовата ни култура, като моделите се разнообразяват – както в документалистиката, така и в игралните примери. Дискурсите, обединени около появата на опасност, идваща от отвън, провокират различни оригинални подходи към темата за мигранти/бежанци в киното. С артикулирането ѝ предефинираме собствената си идентичност и излизаме от затворената рамка на локалния разказ за „Другия”. Разбира се, има и развитие в комуникационния модел, който става много почитивен и атрактивен за аудиторията. А това е много важно не само за битието на българското кино, което трябва да възстанови разкъсаните връзки със собствената си публика. Всъщност само така можем да вървим към осмисляне и преодоляване на стереотипите, предразсъдъците и най-вече първобитно-племенната омраза в обществото ни.

<sup>15</sup> Повече виж при Димитрова, 1995, р.68-78, където се анализират и връзките между авторското френско и немско кино. В случая със „Страх” обаче не можем да кажем, че има такава закъсняла тенденция на влияния от европейското кино от втората половина на ХХ в. върху посттоталитарната ни кинематография. По-скоро транспониране на работещ модел.

**Библиография:**

**Александрова, П., 2012.** *Изгубени в гледането. Бариири пред аудиовизуалните медиуми.* София. [Alexandrova, P., 2012. Izgubeni v gledaneto. Bariieri pred audiovizualnite medii. Sofia.].

**Александрова, П., 2019.** Предимства и предизвикателства на късите филми. Модели и практики на българското късометражно кино. София. [Alexandrova, P., 2019. Predimstva i predizvikatelstva na kasite filmi. Modeli i praktiki na balgarskoto kasometrazhno kino.. Sofia.].

**Александрова, П., 2021.** Митът за южната ни граница във филмите „Граница“, „Под едно небе“ и „Съдилището“. В: *Art Readings 2020 – Journey.* Sofia, 200-209. [Alexandrova, P., 2021. Mitat za yuzhnata ni granitsa vav filmite „Granitsa“, „Pod edno nebe“ i „Sadilishteto“. V: Art Readings 2020 – Journey. Sofia, 200-209].

**Алмалех, З., 2006.** Невидимите малцинства. *Кино*, 2, 32 -34. [Almaleh, Z., 2006. Nevidimite maltsinstva. Kino, 2, 32 -34].

**Георгиева, А., 2003.** *Образи на другостта в българския фолклор.* София. [Georgieva, A. 2003. Obrazi na drugostta v balgarskiya folklor. Sofia].

**Димитрова, М., 1995.** *Авторското кино.* София. [Dimitrova, M., 1995. Avtorskoto kino. Sofia].

**Донев, А., 2020.** Съвременното асоциално българско документално кино. *Проблеми на изкуството*, 2, 46 – 52. [Donev, A., 2020. Savremennoto asotsialno balgarsko dokumentalno kino. Problemi na izkustvoto, 2, 46 – 52.]

**Дончева, Т., 2021.** Асен Владимиров: Песимист по разум, оптимист по воля. *Кино*, 1, 20-25 [Doncheva, T., 2021. Asen Vladimirov: Pesimist po razum, optimist po volya. Kino, 1, 20-25].

**Драганов, И., 2020.** Призраците на нашите страхове. *Кино*, 6, 48 – 57. [Draganov, I., 2020. Prizratsite na nashite strahove. Kino, 6, 48 – 53.]

**Канушева, И., 2019.** Тонислав Христов: За мен киното е зверско удоволствие. *АРТизанин*, 20, 114-120. [Kanusheva, I., 2019. Tonislav Hristov: Za men kinoto e zversko udovolstvie. ARTizanin, 20, 114-120.]

**Мартонова, А., 2020.** Наративът за китайците: визуални стратегии и скрити гласове. В: *Дипломатически, икономически и културни отношения между Китай и страните между Централна и Източна Европа.* Велико Търново, 171-198. [Martonova, A., 2020. Narativat za kitaytsite: vizualni strategii i skriti glasove. V: Diplomaticheski, ikonomicheski i kulturni otnosheniya mezhdu Kitay i stranite mezhdu Tsentralna i Iztochna Evropa. Veliko Tarnovo, 171-198]

**Мечков, Б., 2015.** Миграцията и ксенофобията във фокуса на екранните изкуства. В: *Годишник на департамент „Масови комуникации“ – НБУ.* София, 2015, 169-201. [Mechkov, B., 2015. Migratsiyata i ksenofobiyata vav fokusa na ekrannite izkustva. — Godishnik na departament „Masovi komunikatsii“ – NBU. Sofia 2015, 169-201.]

**Недева, И., 2006.** Черно на бяло за „Невидимите малцинства“. *Обектив*, 130, 7.03. [Nedeva, I., 2006. Cherno na byalo za „Nevidimite maltsinstva“. Obektiv, 130, 7.03.] Available at: <<https://bgelsinki.org/bg/publication/chno-na-byalo-zanevidimite-malcsinstva>> [Accessed 10 March 2021].

**Статулов, Д., 2018.** Да живее България – чий е този филм? *АРТизанин*, 4, 12-13. [Statulov, D., 2018. Da zhivee Balgariya – chiy e tozi film? ARTizanin, 4, 12-13]. Available at: <[https://artizanin.com/love\\_bulgaria/2/](https://artizanin.com/love_bulgaria/2/)> [Accessed 10 March 2021].

**Статулов, Д., 2020.** „Златна роза” 2020. *Култура*, 9 (2972). [Statulov, D., 2020. „Zlatna roza” 2020. *Kultura*. 9 (2972)]. Available at: <<http://kultura.bg/article/627-%E2%80%9Ezlatna-roza%E2%80%9C-2020->> [Accessed 10 March 2021].

**Статулов, Д., 2020b.** Страхът в мен. Разговор с Ивайло Христов. *Култура*. 9 (2972). [Statulov, D., 2020. Strahat v men. Razgovor s Ivaylo Hristov. *Kultura*. 9 (2972)]. Available at: < <http://kultura.bg/article/617-strahyt-v-men-razgovor-s-ivailo-hristov->> [Accessed 10 March 2021].

**Фасбиндер, Р.В., 2003.** *Анархия на фантазията*. София, 2003. [Fassbinder, R.W., 2003. *Anarhiya na fantazyata*. Sofia, 2003].

**Doncheva, G., 2016.** The ambiguous presence of the foreigners in Bulgarian post-communist cinema. In: *Roads and Crossroads in the Balkans: Collection of Papers*, Cetate, 25-32.

**Martanova, A., 2020b.** Dimensions of the Journey in Stephan Komandarev`s Feature Films. In: *Art Readings 2020 – Journey*. Sofia, 193-199.

**Rings, G., 2016.** *The Other in Contemporary Migrant Cinema: Imagining a New Europe?* New York & London.

**Spasova-Dikova, J., 2017.** On Comedy, Values and "Bears" in Bulgaria. *Papers of BAS*, 4 (2), 175-184.

### **Филмография:**

*Да живее България* (*Long Live Bulgaria*, България, 2017, 55 мин., документален), реж. Адела Пеева.

*Добри* (*Dobry*, България, 2017, 28 мин, късометражен, игрален), реж. Орлин Милчев Orlin Milchev. Available at: <http://kinematograf.bg/dobri-film>

*Изпит* (*Trials*, България, 2017, 28 мин, късометражен, игрален), реж. Боя Харизанова.

#### **Невидимите малцинства (2006, пакет от пет документални филма):**

- „Без граници, без нации” (36 мин, реж. Любен Бързаков)
- „Дунен сладкиш” (30 мин., реж. Елисавета Манолова и Жана Попова)
- „Махди Сафар” (27 мин., реж. Димитър Цветанов, Иван Николов, Александър Евтимов)
- „Хора от страната на кедровите дървета”, (30 мин, реж. Павлина Ангелова, Николай Тодоров)
- „Черно на бяло” (реж. Яна Тавание, Ива Петрони, Боряна Пандова)

*Пощальонът* (*The Good Postman*, Финландия-България, 2016, 80 мин., документален), реж. Тонислав Христов.

*Пътуващо кино* (*Traveling cinema*, България, 2019, 125 мин, игрален), реж. Илия Костов.

*Страх* (*Fear*, България, 2020, 100 мин., игрален), реж. Ивайло Христов.

*Страх изяжда душата* (*Angst essen Seele auf / Ali: Fear Eats the Soul*, ФРГ, 1974, 94 мин, игрален), реж. Райнер Вернер Фасбиндер.

*Съдилището* (*The Judgment*, България-Германия-Хърватия, 2014, 107 мин., игрален), реж. Стефан Командарев.

*Валентин Китанов*  
*Югозападен университет „Неофит Рилски“, Благоевград*

*Valentin Kitanov*  
*South-West University “Neofit Rilski”, Blagoevgrad (Bulgaria)*  
*[kitvalmil@swu.bg]*

**С чибук и наргиле: Жадуваните „бягства“ в  
ароматното пространство на Ориента**  
***Щрихи от културните интерпретации на  
тютюна в Османската империя***

**Abstract:** *The penetration of tobacco into the Ottoman Empire was followed by a ban on its production and use in the seventeenth century. The lifting of the ban in 1688 led to the rapid spread of production and trade with tobacco products and made smoking widely popular in the Ottoman society. Although smoking was prevalent mainly among Muslims, the chibouk and the hookah became distinctive attributes and, for generations, an integral part of the cultural characteristics of sultan’s subjects, regardless of their religious or national affiliation. Whether it was consumed free or secretly due to penal laws, smoking became emblematic of the social and cultural representation of the Ottoman realm and, in a way, it was affiliated with a particular zone of comfort and tranquillity, an escape from all worries and problems of everyday life.*

**Key words:** *Ottoman Empire; tobacco; smoking; chibouk; hookah; escape*

В историческата и специализираната литература преобладава мнението, че тютюнът се появява на територията на Османската империя в края на XVI – началото на XVII в., независимо че са изказани предположения за неговото присъствие в тези географски ширини още през последната четвърт на XVI в. (Billings 1875: 103; Laufer 1924: 61; Brooks 1937: 41; Faroqhi 2005: 217; Greham 2006: 1352; Shechter 2006: 16; Neuburger 2013: 4; Мюлер 1916, 6-7; Бехар 1927: 13; Байлов, Попов 1952: 7-8; Матковски 1966: 139; Белчев 2006: 2; Питеков 2010: 11). Заповед на султан Ахмед I (1603-1617) от 1611 г., в която тютюнът е споменат за първи път в официален

османски документ, третира забраната за неговата продажба и употреба в империята. Този акт вероятно преповтаря предишна забрана, защото английският пътешественик Джордж Сандис още през 1610 г. обръща внимание, че османските поданици пушат с чибуци на скрити места и сравнява пристрастеността им към новото растение с тази към кафето и опиума (Sandys 1673: 52). Редица провинциални управители настойчиво съблюдават изпълнението на заповедта (Graham 2006: 1362). Налице е бързо за стандартите на тогавашната епоха разпространение на употребата на тютюн, чиито последствия не са могли да бъдат прогнозирани от официалната власт и, подобно на редица европейски държави, тя предприема неговата забрана. Османският историк Ибрахим Печеви е гневен, че тютюнопушенето е проникнало сред представители на религиозните и държавните институции (Матковски 1966: 144). От своя страна, официалният летописец Мустафа Наима определя навика да се пуши като причина за моралното и религиозното разложение, което засяга и редица влиятелни личности, а за шейх Ибрахим Ал-Ликани тютюнът е *„най-демонската стока, която човек може да измисли“* (Матковски 1966: 146).

Тези категорично негативни оценки, изразени от високопоставени представители на културните и религиозните среди, съвпадат с отношението на властта към новото растение и предопределят предприемането на силно рестриктивни мерки срещу употребата на тютюн по времето на султан Мурад IV (1623-1640). През периода 1634-1638 г. в няколко последователни фермана османският владетел не само налага пълна забрана за производството, разпространението и употребата на тютюна, но и нарежда *„тайно и явно да поставят хора, които да извършват контрол и инспекция и ако се открие в къщата на някой тютюн, ако го сее или го събира на нивата си, ако го продава или купува, ако го обработва или консумира, ако устата или дрехите му миришат на тютюн..., да няма милост и ако не се подчиняват на моята царска заповед, да се обесят пред къщите им, а имотът и продуктите им да се продадат в полза на държавата“* (Бошков 1966: 96-97). Забранителните действия на султанската институция продължават и при управлението на султан Ибрахим I (1640-1648) и султан Мехмед IV (1648-1687), макар и не толкова стриктно и последователно (Матковски 1966: 151).

Първоначално Улемата реагира в унисон със султанската политика и начело с шейх-юл-исляма определя употребата на тютюн като нарушение на постановките в Шариата, поради което, съгласно



сведенията на Наима, я обявява за неodobrena от религията – „mekruh“, и порочна – „fisk“ (Матковски 1966: 146). Ситуацията обаче е динамична и няколко години по-късно друг представител на религиозната институция – шейх-юл-ислям Бахай Ефенди, със специална фетва през 1646 г. разрешава консумацията на тютюн, което изследователите свързват с факта, че самият той е бил пристрастен към пушенето (F. Yılmaz 2005: 19; Batman 2016: 2). Тази фетва обяснява в известна степен обстоятелството, че независимо от султанските рестрикции и първоначалния религиозен отпор, към средата на века употребата на тютюн вече е разпространена сред различни категории население. Всъщност, религиозният лидер на практика санкционира едно съществуващо положение, защото реално още от първите десетилетия на своето присъствие в империята тютюният става популярен сред значителна част от османските поданици, независимо дали става въпрос за обикновено население, или за представители на висшите социални кръгове (Isin 2008: 65; Laufer 1924: 63).

В пътеписната литература се срещат много сведения за периода на забранителния режим, които показват, че производството на тютюн присъства в аграрното всекидневие, а пушенето се практикува внимателно, скрито от погледите на властта и изразява един вид бягство от декретираните ограничения на закона. Вече посочихме сведенията в тази насока, които дава още през 1610 г. Джордж Сандис (Sandys 1673: 52). Интересно свидетелство откриваме и половин век по-късно в разказа на английския дипломат и пътешественик Джон Бърбъри за официалната посолствена мисия от 1664-1666 г., която хабсбургският император Леополд I изпраща в Османската империя и е във връзка с присъствието на тютюн по време на един официален обяд, състоял се в Одрин през август 1665 г. След характеристиките за османците хигиенни навици преди всяко хранене, те поднасят на гостите кафе, последвано от шербет и накрая „тютюн на тези, които го обичат (във или близо до двора той е забранен), и тогава обикновено започват разговорите“ (Тодорова 1987: 162). От своя страна, английският пътешественик Едуард Браун, който посещава Тесалия през 1669 г., отбелязва, че наравно със сусам и памука, независимо от съществуващите забрани, населението отглежда и тютюн, който е считан за много по-качествен от произведения в други части на страната, защото е много по-силен и лют (Brown 1673: 64). Заслужава внимание и кратката бележка в дневника на свещеника на английското посолство в османската столица Джон

Ковъл от 1675 г. относно утвърдената традиция сред жители на Истанбул да посещават през лятото едно популярно и прохладно място за отдих, извън чертите на града по посока на Одринския път, около един огромен чинар и извор с хубава питейна вода, където много хора се събират, „седейки на килим с тютюн, кафе, чиста вода и пр.“ (Тодорова 1987: 198). И тук споделеното от английския свещеник впечатление се отнася за времето преди официалното легитимиране на дейностите по тютюна, което се случва при управлението на султан Сюлейман II (1687-1691) през 1688 г. (Панова 1980: 26).

От редица официални документи става ясно, че употребата на тютюн прониква преди всичко в средите на държавната администрация, военното съсловие, религиозните среди, т.е. в социалното пространство, което е извън категорията на раята. Основателността на подобна констатация е подкрепена от текста на султанския ферман от 1635 г., който определя кадиите като отговорни за спазването на забраната и за наказанието на лицата, които го употребяват, независимо дали става въпрос за еничарин, спахия, кадия, наиб, тимариот, при положение, че не се подчиняват на установените разпоредби (Матковски 1966: 172).

Забранителният режим продължава официално до 13 август 1688 г., когато султан Сюлейман II с изричен ферман официално разрешава производството и търговията с тютюн и въвежда за първи път, подобно на други европейски страни, данък върху производството му и държавни такси за легитимна търговия с тютюневата продукция (Панова 1980: 26; Мюлер 1916: 7; Ядков 2003: 105). Османските историци Силяхдар Финдикли Мехмед ага и Мехмед Рашид посочват като основна причина за прекратяването на забранителната политика на властта по отношение на тютюна финансовите интереси и осъзнаването, че данъчното санкциониране на дейностите по производството, търговията и употребата на тютюн ще доведе до сериозни приходи в държавната хазна (Матковски 1966: 153-155). Определянето на тютюнопроизводството и търговията с тютюневи изделия като легитимна стопанска дейност автоматично поставя и употребата на тютюна извън неблагоприятните човешки навици.

Официалното отменяне на забраната върху тютюна е последвано от неговото постепенно легитимиране в културен, социален и религиозен контекст – нещо, което е прокламирано и от издадената през 1646 г. фетва (Yılmaz 2005: 19; Batman 2016: 2). Ситуацията е променена и в религиозно-етичен смисъл и това създава условия за появата на редица митове и легенди за значението и ролята на тютюна.

тюна в културното развитие на мюсюлманите, много често с претенции за историческа оригиналност. В широко познат сред ислямските страни мит се прави опит да се формира представа за появата на тютюна с използването на религиозни персонажи. Митът описва среща между пророка Мохамед и змия, която го ухапва по ръката, но след като пророкът изсмуква ухапаното място, там израства тютюневото цвете (Burns 2007: 34). Разбираемо е, че митът има известно отношение към редица хипотези относно арабския произход на тютюна, но това е оригинален начин да се санкционира концепцията за мястото на възникването на тютюна посредством ролята на най-висшия персонаж в ислямската религия и история. Той е показателен и за превръщането на тютюна в интегрална част от ислямския бит, култура и самооценка. Постепенно употребата на тютюн престава да се възприема като бягство от контрола на властта или нарушение на религиозния морал. Нещо повече – тютюнът в Османската империя започва да присъства на различните културни нива в социума чрез разнообразни церемониални прояви или смислови жестове като индикация за ценност и престижност.

Разгледан като вид наркотично вещество, когато тютюнът се появява в османското общество вече е налице утвърдена традиция на употреба на различни наркотици. Както сред обикновените хора, така и в средите на еничарите, членовете на дервишките братства, моряци от различни държави, позната и често практикувана е употребата на хашиш, коноп и опиум. В подкрепа на това мнение Екрем Ишин се позовава на османския пътеписец и историк Евлия Челеби, който изброява девет вида хапчета с различно съдържание на опияняващи субстанции (Isin 2008: 65). Тютюнът се появява в културата на османския поданик като ново растение, което се интегрира в средата на употребяваните наркотични продукти, още повече, че в социалния пейзаж на османската столица от средата на XVI в. се появява кафенето като място за социална комуникация, културен обмен на ежедневен ниво и споделяне на пристрастените влечения към кафето и чая. Екрем Ишин цитира Ибрахим Печеви, според когото първото кафене е открито в истанбулския квартал Тахткале през 1554-1555 г. (Isin 2008: 64-65). Всъщност това, което се случва с тютюна на османска територия, не е нещо различно от традициите на пристрастяване към определени субстанции в различните общества и епохи. Ще си послужим с оригиналното уточнение на Фернан Бродел, че *„всяка цивилизация има нужда от луксозни храни и от редица стимулиращи „допингови“ средства“*, а тютюнът се нарежда

сред групата на алкохола, кафето и чая, популярността на които е трасирана от XVI в. (Бродел 2017: 212).

Посочените по-рано в текста документи за забрана, употреба и разпространение на тютюна са много показателни за желанието на османската централна власт да установи контрол върху ежедневието и евентуалното събиране на големи групи от хора, които, обединени от навика на тютюнопушенето или употребата на кафе и алкохол, се превръщат в социален кръг, където би могло да се обменят мисли и коментари, критични към властта. Това е признание за ролята на тютюна в създаването на нова социална и културна действителност, която властта не е в състояние да контролира ефективно и затова прибегва към крайни забранителни и ликвидационни мерки, които нямат никакво смислено оправдание от стопанска или финансова гледна точка. За властта не е без значение, че кафенетата са места, често посещавани от представители на провинциалната административна власт и на улемата, където употребата на забранени питиета и на тютюн се съчетава с четене на книга, играене на шах и табла и провеждане на разговори по злободневни теми (Първева 2011: 102). Това, което е важно с оглед на настоящата тема, е, че атмосферата на тайно пушене в кафенетата създава особено отношение към тютюна и специфичен маниер на неговата употреба, които ще се запазят и през следващите столетия, но вече с друг контекст, необременен от заплахата за санкция. Оказва се, че продължителният период на скритата от властта консумация на тютюн формира разбирането за прекараното време с чибук или наргиле в ръка като един незаменен начин за усамотение и бягство от реалността, което пренася пушеция в света на безгрижието и духовната наслада. След премахването на забраната, освен кафенето, като основни социални топоси на тютюна ще се очертаят обществените сгради, пространствата на банята, бръснарницата, чаршията и пр.

Постепенно нещата се променят и няколко десетилетия по-късно тютюнът ще присъства трайно и по различни начини като елемент от всекидневието на административните и социалните структури. Сведения в посока ролята на тютюна в османското ежедневието регистрира Келемен Микеш, който е сподвижник и секретар на водача на унгарската освободителна борба Ференц II Ракоци по време на неговото изгнаничество в Османската империя в периода 1717 – 1735 г. (Бур-Марковска 1974: 95). В „Писма от Турция“, писани по това време, Келемен Микеш не пропуска да отбележи, че при посещение на някой османски чиновник домакинът задължи-

телно предлага на госта да изпушат по една лула с тютюн, чаша с кафе, след което той ще произнесе няколко думи, последвани от дълго мълчание, което може да продължи с часове и рядко е прекъсвано от кратки фрази (Микеш 2017: 80; Якоч 2005: 71).

Предлагането на кафе и изпушването на лула тютюн, или подаряването на тютюневи аксесоари, се утвърждава като етикет на османската администрация и част от церемониала при посещение на високопоставен служител, което се прави с подчертана тържественост, която английският политик Джон Кам Хобхаус определя като *“обичайна за хората в тази страна при приемането на посетители”* (Hobhouse 1813: 14) по повод срещата си с управителя на град Превеза в края на септември 1809 г. или тази в двореца на османския военен и политически деец Али Паша в Янина (Hobhouse 1813: 111).

От друга страна, проличава как намиращите се на територията на империята чужденци възприемат употребата на тютюн в ежедневието на османските поданици като културен феномен, който присъства с характерната за Ориента ритуалност и формира особен етикет и стил. Тютюнът е един от най-лесните начини да се слееш с обстановката на Ориента и по този начин да избягаш от страховете си и да преодолееш по-лесно културния и психологически шок от една действителност, която е подредена по различен от европейския начин. При описанието на първите си впечатления от Смирна през 1834 г. като град, който осъществява връзката между Изтока и Запада, английският историк и пътешественик Александър Кинглейк констатира поведението на европейците като хора, които, за да приемат реалността, преодоляват безпокойството си с *„дълга турска лула на спокойствието“*, както той нарича чибука (Kinglake 1847: 49).

Като изключим възприемането на употребата на тютюн като поквара и предпоставка за морално разложение през началния период на неговото разпространение на Балканите и на територията на Османската империя като цяло, през следващите векове след официалното санкциониране на продукта от данъчната система и повсеместното му проникване в ежедневието на различни социални слоеве и служебни категории отсъстват свидетелства за крайно отрицателно отношение към тютюна и неговата консумация. Никой вече не си спомня за определението на Ибрахим Ликани за тютюна като *„най-демонската стока, която човек може да измисли“* (Матковски 1966: 146). В различни социални и културни пространства се

наблюдава непреодолимо желание за усамотение в компанията на дългия чибук или наргилето. За разлика от други човешки навици, попадащи в категорията „пороци“, тютюнът не е предмет да фолклорна санкция, която да формира негативна социална оценка за индивида, пристрастен към тютюнопушенето. Забрани съществуват, но те са предпоставени не от крайни идеологически, културни или религиозни причини, а по-скоро са свързани със следването на определени професионални, етични или здравословни правила на поведение. Целта им е да се гарантира сигурност и ритъм в производствения процес, благоприлично възпитание на малолетни лица или те са израз на уважение към религиозни традиции.

Тютюнът прониква и сред най-широките слоеве на населението, като употребата му е вследствие не толкова на модни тенденции, колкото на навик, естествено втъкан в монотонния живот на градския или селския жител. Джон Кам Хобхаус свидетелства за традицията от началото на XIX в. в село Кифисия, Атика (сега предградие на Атина, бел. моя) мюсюлманите да се събират в центъра на селото около две чешми и под сянката на старо дърво и колективно да пушат лулите си на спокойствие (Hobhouse 1813: 436). От друга страна, за шотландския пътешественик и военен Джеймс Александър е странно да приеме, че колективното пушене на тютюн обикновено е занимание за възрастните турци по селата, които, *„зптайки безучастно пред себе си, като че ли потънали в дълбок размисъл, и бавно изпускали от черешовите си чибуци кълба дим“* (Тодорова 1987: 684). Обичайна практика е по време на пътувания да се спира за почивка на определени гористи места и понякога да *„се изпушва една лула“*, както отбелязва френският картограф и етнограф Ами Буе в своята „Европейска Турция“ през 1838 г. (Цветкова 1981: 476). Подобен случай откриваме и в пътеписа на Александър Кинглейк от 1834 г., когато при пътуване до Светите места той и неговите придружители трябва да останат една вечер под открито небе край река Йордан. В определен момент от вечерта, след обичайните приготовления за вечеря, запалване на огън и подготовка за сън, склонният към поетичност английски историк отбелязва появата в атмосферата на нощния престой и на чибука, охарактеризиран от него като *„голям утешител на онези, които са гладни и уморени от пътуване“*. Кинглейк подчертава, че в такива моменти тютюнът заличава границите между хората от различен ранг, помага да се избяга от притеснението и да се преодолее неудобството от произхода и нелов-

костта, „които човек понякога изпитва, когато е в компания със своите подчинени“ (Kinglake 1847: 134).

През XVIII в. тютюнът вече присъства плътно на всички нива в ежедневието, битата, трудовата дейност и в религиозно-празничната традиция на балканските мюсюлмани. В тази връзка много ценни са впечатленията на Келемен Микеш относно поведението на мюсюлманите по време на поста през свещения месец Рамазан, когато до залез слънце не се позволява човек да се храни и да пие вода. Интересно е, че според Микеш това, което е най-трудно за тях, е забраната да се пуши, нещо, което бързат първо да направят след залез (Микеш 2017: 384). За задължителността от най-строгото въздържание през месец Рамазан и за забраната за употреба на кафе и тютюн, не в конкретен смисъл за даден район, а като обща религиозна догма, споменава в своя дневник през 1809 г. и Джон Кам Хобхаус. Отбелязваме това, за да подчертаем неговото впечатление от плътното проникване на тютюна сред мюсюлманските среди и неудобството да се спазва подобна забрана, което личи от фразата на Хобхаус, че е абсолютно задължително по време на месец Рамазан вярващите да се въздържат, „дори от тютюн и кафе“, разбира се, единствено през деня, защото „свс залеза на слънцето започва пиршеството“ (Hobhouse 1813: 77). През 1827 г., пак по време на Рамазан, капитанът от британската кралска флота Чарлз Франкланд отбелязва в своя пътепис как служители на пощенската станция в Къркклисе (Лозенград, бел. моя), след залез слънце „набързо се справиха със скромното ядене, което рамазанът предлага на всички добри мюсюлмани“, след което началникът на станцията „взе своето нарگیле (турците наричат този вид лула *nargela*), което пушеше през голяма кристална ваза с розова вода“ (Тодорова 1987: 606). Повече от век и половина по-късно попадаме на тази практика в разказа на македонския революционер и юрист Христо поп Антонов за родното му село Ваташа, Тиквешко, чиито жители са българи – християни и мюсюлмани. Антонов описва как по време на Рамазан селяните очакват „да стане 12 часа навечер, за да земат ифтар(храна), за да сложат нещо в устата... а цигарата и кибритът още преди това ги очакват в ръцете“ (Поп Антонов 2006: 29).

Страстта към пушенето сред мюсюлманите прави впечатление на чужденците, които често недоумяват как една лула тютюн може да измести фокуса на належащите нужди и да изрази контурите на ориенталското безгрижие. В своя пътепис от 1718 г. секретарят на австрийското посолство в османската държава Герард Корнелиус

Дриш описва интериора и атмосферата на богатите турски къщи в София, като не пропуска да отбележи, че мюсюлманите могат да пушат тютюн *„лениво почти целия ден, ако нищо не им пречи в това“* (Йонов 1986: 243). През 1806 г. шотландският пътешественик Адам Нийл описва атмосферата на един кервансарай във Варна, където впечатление му прави групата от няколко души турци, които *„спокойно пушеха своите дълги чибуци и слушаха с истинско удоволствие острия звън на балалайка, под чиито звуци няколко жалки полуголи циганчета кривяха светлокафявите си премръзнали крайници“* (Тодорова 1987: 455).

За невъзмутимото преклонение към тютюна и пренебрежителното отношение към съпътстващите ежедневните грижи и проблеми по време на любимото им занимание с лулите и наргилетата много убедителен пример ни е оставил френският пътеписец С. Сейже от 1829 г. Свидетел на скандалното поведение на една луда жена, която *„почти съвсем гола, разпенена от бяс и хвърляща камъни подир минавачите с ужасни крясъци“* на оживено място в град Димотика, той е впечатлен от спокойствието на група турци, които *„бяха насядали чорбаджийски под един кипарис срещу тази луда, пушейки свободно лулите си, без да изглежда, че това ужасно зрелище ги засяга и най-малко“*. Опитът му да поиска от тях да вземат отношение по случая и да помогнат на жената е неуспешен и последван от кратката реплика на най-възрастния от тях - *“Аллах е велик“*, който, за разочарование на френския пътеписец, *„нак се зае с лулата си“* (Цветкова 1981: 162).

Един такъв частен случай, характерен за османското ежедневие, проектира в себе си цивилизационен по своята същност дискурс, когато провиденциализмът и вярата в съдбовното предопределение си дават среща с чисто човешкото и необременено от религиозност възприемане на нестандартна житейска ситуация. Важното, което е необходимо да се подчертае с оглед на настоящото изследване, е, че тютюнът и неговата употреба способстват да бъдат проявени дълбоки и характерни пластове от османската ценностна система, докосването до които е трудноразбираемо за рационалното мислене на един западноевропейец. Чуждестранните наблюдатели са впечатлени от възприемането на тютюнопушенето като особена зона на комфорт и въздействието му върху мисленето, настроението и поведението на мюсюлманите. През 1834 г. Александър Кинглейк не скрива възхищението си от обикновен жител на Смирна, който с особено достойнство и достолепие пуши *„с цялото величие на сул-*



тан“ (Kinglake 1847: 49). Красноречив пример за удовлетворението от тютюнопушенето сред османските поданици е и оценката на Майкъл Куин за заместник-управителя на Видин при срещата си с него през есента на същата година. За ирландския журналист и пътешественик е странно колко бързо османският служител може да се унесе в мечтания „*сякаш миризмата на тютюна му е парфюмът на Рая*“ (Quin 2010: 119).

Горепосочените примери не трябва да подвеждат към еднопосочно детерминиране на културата на тютюна като отличителна характеристика единствено на балканските мюсюлмани. В началото на XIX в. по време на своята обиколка в Северна Гърция английският военен Уилям Лийк отбелязва в своя пътепис основните ангажименти на мъжете в гръцкия град Превеза. Наред с риболова, търговската и крайбрежната навигация около Епир, Акарнания и островите в Йонийско море, те прекарват немалка част от деня си в „*пушенето на лула в безделие у дома*“ (Leake 2010: 176). По време на срещата с гръцкия православен митрополит в Одрин през 1829 г. Джеймз Александър отбелязва ритуалното поднасяне на „*лули и кафе, след което според левантинския обичай на поднос бе поднесено сладко с чаша вода*“ (Тодорова 1987: 711). Още преди тази среща, през лятото на същата година английският военен посещава и „*бръснарницата на един грък*“ в Бургас, където освен нормалните процедури, свързани с външния му вид, има възможността да консумира тютюн и кафе (Тодорова 1987: 683). Отново през 1829 г. С. Сейже е приет заедно с руския полковник Белогушев от православния митрополит на Димотика с поднесени „*кафе и лули*“ (Цветкова 1981: 160).

Посоченото в горните примери проникване на културата на тютюна извън мюсюлманската среда става още по-осезаемо през втората половина на XIX в., когато започва да си пробива път и цигарата. Нейната поява в социалното пространство на българите и на османските поданици на Балканите като цяло обаче не е в състояние да измести чибуката и наргилето, предпочитанията към които, и особено към наргилетата при консумацията на тютюн, се запазват през следващите десетилетия като масов навик. Това особено важи за териториите, които остават до по-късно интегрална част от Османската империя. През 1908 г. българският журналист и писател Петър Завоев посещава Солун и изразява впечатлението си в разказа за атмосферата на града, където в кафенетата много посетители предпочитат да прекарат свободното си време, както авторът отбелязва, като „*смучеха наргилета и унесено разговаряха*“ (Завоев 1916: 71)

Очевидно цигарата не е в състояние да конкурира традиционните за страната практики на тютюнопушене, вероятно много по-прилягащи на културния манталитет на османския поданик, поради допълнителното психологическо въздействие и специфичната атмосфера на социален контакт, които създават.

Тези примери са красноречиво доказателство за особената роля на тютюна в личното пространство на османския поданик, за превръщането на този навик в един вид бягство от реалността и потапяне в атмосферата на спокойствие, безгрижие и отсъствие на житейските проблеми. Някои автори ще свържат пристрастеността към тютюна с една от причините, довели до формирането на особен стереотип на мислене и поведение, охарактеризиран най-често като ориенталска леност. В търсене на културно-психологическите предпоставки за османския политически и социален упадък тази оценка в повечето случаи ще попречи да се осъзнаят истинските причини за историческия залез на Османската империя.

Представата за тютюнопушенето в Османската империя като характерен начин да бъде изразено отношение към даден проблем ще се генерализира и ще прерасне в типологична оценка, споделяна при случаи, когато трябва да се демонстрира определено културно, социално и дори политическо настроение към населението и властта в османската държава. Диапазонът на отношение към османската действителност, пречупено през разбирането за мястото на тютюна в културното ежедневие на страната, е достатъчно широк, за да предложи различни и коренно противоположни позиции и интерпретации. В повечето случаи те са проекция или продължение на предварително утвърдено разбиране, или на формирана нагласа. Бъдещият британски министър-председател Бенджамин Дизраели, който посещава Османската империя през 1830 г., намира за важно да сподели в своята кореспонденция, че „*сластното излягане на диваните*“, което е съпроводено с пушенето на „*великолепни наргилета*“, е характерен елемент на османския начин на живот, чието спокойствие и меланхолизъм му допадат, според неговото лично откровение, много повече от салонната представителност и суета на английското ежедневие (Генов 2006: 157). Позитивното отношение към картината на османското ежедневие, трайно определена и от присъствието на тютюна в нея, ще прерасне в страстно проявената от британския политик защита на целостта на Османската империя няколко десетилетия по-късно. Точно тогава обаче се натъкваме на един много характерен пример от последната четвърт на XIX в. в

условията на изострени международни отношения по Източния въпрос и използването на трудното положение на подвластните народи за прокарването на антиосманска пропаганда. В условията на Руско-османския конфликт от 1877-1878 г., а и в годините след него, много широка популярност добиват различни нагледни материали, в повечето случаи картини, които са плод на представите от журналистическите съобщения за зверствата по време на Източната криза. Унгарският историк Лайош Талоци описва видяна от него подобна картина по време на престоя си във Видин през 1881 г., която изобразява мъчението на двама българи от турци пред погледа на султана, който наблюдава случката „*като пуши с големия си чибук и се наслаждава*“ (Пейковска 1992: 209). Това е красноречив случай да бъде изразена антихуманната черта от характеристиката на османската държавност и употребата на тютюна вече като художествено изразно средство, символизиращо състояние на ориенталско безгрижие и безчувственост.

В противоположност на изразеното от Дизраели преклонение пред ориенталската леност и спокоен начин на живот, в случая превръщането на тютюна и неговата употреба в нарицателна категория за оценка на духовно-политическите параметри на асиметричното разбиране за историческото време от страна на османската държавност в лицето на султана не е случайно. То е резултат от вековно европейско наблюдение върху културните аспекти на османското общество, неговите поданици и на самата власт, а пушенето с чибук е сполучлив инструмент-символ за безтекстуален, но разбираем на битово ниво рисунък-олицетворение на европейската представа за османската социално-психологическа характеристика, не единствена, но във всеки случай много по-масова от представата на Дизраели. В случая тютюнът и султанският чибук символизират непреодолимото желание за бягство на османската държавност от динамиката на една сложна и противоречива епоха и вековния стремеж да се съхрани не толкова статуквото на миналото величие, колкото усещането за безапелационен контрол върху територии, които се изплъзват от властта на султана и които са балканските пространства на тютюна.

### **Библиография:**

**Batman, M.,** 2016. *Tobacco Smuggling in the Black Sea Region of the Ottoman Empire, 1883-1914.* Istanbul: Libra.

**Billings, E. R., 1875.** *Tobacco. Its History, Varieties, Culture, Manufacture And Commerce.* Hartford, Conn.: American Pub. Co.

**Brooks, J. E., 1937.** *Tobacco: Its History Illustrated by the Books. Manuscripts and Engravings in the Library of George Arents, Jr., vol.1 (1507 – 1615).* New York: Rosenbach Co.

**Brown, E. A., 1673.** *A brief account of some travels in Hungaria, Servia, Bulgaria, Macedonia, Thessaly, Austria, Styria, Carinthia, Carniola, and Friuli as also some observations on the gold, silver, copper, quick-silver mines, baths and mineral waters in those parts : with the figures of some habits and remarkable places.* London: Printed by T.R. for Benj. Tooke. Web. 20.03.2021.

[https://archive.org/details/briefaccountofso00brow\\_0](https://archive.org/details/briefaccountofso00brow_0).

**Burns, E., 2007.** *The Smoke of the Gods. A Social History of Tobacco.* Philadelphia: Temple university press.

**Faroghi, S. 2005.** *Subjects of the Sultan: Culture and Daily Life in the Ottoman Empire.* London, New York: I.B. Tauris.

**Greham, J., 2006.** Smoking and “Early Modern” Sociability: The Great Tobacco Debate in the Ottoman Middle East (Seventeenth to Eighteenth Centuries). – *The American Historical Review*, 111 (5): 1352–1377.

**Hobhouse, J. C., 1813.** *A Journey Through Albania and Other Provinces of Turkey in Europe and Asia, to Constantinople, During the years 1809 and 1810.* Second edition, Vol. I. London: Printed for James Cowthorn. Web. 16.04.2021.

[https://archive.org/details/gri\\_000033125008542488](https://archive.org/details/gri_000033125008542488).

**Isin, E., 2008.** *Everyday Life in Istanbul: Social Historical Essays on People, Culture and Spatial Relations.* Istanbul: Yapi Kredi Publications.

**Laufer, B., 1924.** *Introduction of Tobacco into Europe.* Chicago: Field Museum of Natural History.

**Leake, W., 2010.** *Travels in Northern Greece (1835), vol. I,* Cambridge University Press. DOI:<https://doi.org/10.1017/CBO9780511740206>.

**Neuburger, M., 2013.** *Balkan Smoke: Tobacco and the Making of Modern Bulgaria.* Ithaca, N.Y.: Cornell University Press.

**Quin, M. J. 2010.** *A Steam Voyage Down The Danube: With Sketches Of Hungary, Wallachia, Servia, Turkey, Etc. (1836).* Kessinger Publishing, LLC.

**Sandys, G., 1673.** *Relation of a Journey begun An: Dom: 1610. Foure Bookes. Containing a Description of the Turkish Empire, of Aegypt, of the Holy Land.* London: W. Barrett.

**Shechter, R., 2006.** *Smoking, Culture and Economy in the Middle East. The Egyptian Tobacco Market 1850–2000.* London, New York: I.B. Tauris.

**Yilmaz, F., 2005.** *Osmanlı İmparatorluğu’nda Tütün: Sosyal, Siyasi ve Ekonomik Tahlili 1600-1883,* İstanbul: İstanbul Üniversitesi, Sosyal Bilimler Enstitüsü, Basılmamış Doktora Tezi.

**Байлов, Д., Попов, М., 1952.** [Baylov, D., Popov, M.] *Тютюн.* София [Tyutyun. Sofiya].

**Белчев, К., 2010.** [Belchev, K.] *Тютюнът в България.* Стара Загора: Слънце [Tyutyunat v Balgariya. Stara Zagora: Slantse].

**Бехар, А., 1927.** [Behar, A.] *Тютюнът в България.* София [Tyutyunat v Balgariya. Sofiya].

**Бошков, В. (ред.), 1966.** [Boshkov, V.] *Турски документи за историјата на македонскиот народ, Серија прва, том II.* Скопје: Архив на СР Македонија [Turski

dokumenti za istorijata na makedonskiot narod, Serija prva, tom II. Skopje: Arhiv na SR Makedonija].

**Бродел, Ф., 2017.** [Brodell, F.] *Материална цивилизация, икономика и капитализъм, XV – XVIII век. Том I. Структурите на всекидневието: възможното и невъзможното.* София: Прозорец [Materialna tsivilizatsiya, ikonomika i kapitalizam, HV – HVIII vek. Tom I. Strukturite na vsekidnevieto: vazmozhnoto i nevazmozhnoto. Sofiya: Prozorets].

**Бур-Марковска, М., 1974.** [Bur-Markovska, M.] Ференц Ракоци II (1676 – 1735 г.). – *Исторически преглед*, кн. 4, 83-96 [Ferents Rakotsi II (1676 – 1735 g.). – Istoricheski pregled, kn. 4].

**Генов, Р., 2006.** [Genov, R.] Дизраели, имперската политика и българският аспект на кризата на Източния въпрос, 1875 – 1878 г. [Dizraeli, imperskata politika i balgarskiyat aspekt na krizata na Iztochniya vapros, 1875 – 1878 g.] – *Bulgarian Historical Review*, 1-2: 151-162.

**Завоев, П., 1916.** [Zavoev, P.] *Писма от Македония (1908–1916): Пътни бележки, наблюдения и впечатления.* София: Либерален клуб [Pisma ot Makedoniya (1908–1916): Patni belezhki, nablyudeniya i vpechatleniya. Sofiya: Liberalen klub].

**Йонов, М., (съст.), 1986.** [Yonov, M.] *Немски и австрийски пътеписи за Балканите XVII – средата на XVIII в.,* София: Наука и изкуство [Nemski i avstriyski patepisi za Balkanite HVII – sredata na XVIII v., Sofiya: Nauka i izkustvo].

**Матковски, А., 1966.** [Matkovski, A.] Кон ранната история на тутунот на Балканският полуостров со посебен осврт на Македонија – *Гласник на Институтот за национална историја*, бр. 2-3 Скопје [Kon rannata istorija na tutunot na Balkanskiyot poluostrov so poseben osvrt na Makedoniya – Glasnik na Institutot za natsionalna istorija, br. 2-3 Skopje].

**Микеш, К., 2017.** [Mikesh, K.] *Турецкие письма.* Москва: Наука [Turetskie pisyma. Moskva: Nauka].

**Мюлер, К., 1916.** [Myuler, K.] *Производство, обработване и търговия с тютюн в Европейска Турция, а сега Нова България.* София: Министерство на финансите [Proizvodstvo, obrabotvane i targoviya s tyutyun v Evropeyska Turtsiya, a sega Nova Balmariya. Sofiya: Ministerstvo na finansite].

**Панова, Сн., 1980.** [Panova, Sn.] *Българските търговци през XVII век.* София: Наука и изкуство [Balgarskite targovtsi prez HVII vek. Sofiya: Nauka i izkustvo].

**Пейковска, П., 1992.** [Peukovska, P.] Пътепис за България на Лайош Талоци от 1881 г. – *Известия на държавните архиви*, кн. 64: 201-232 [Patepis za Balmariya na Layosh Talotsi ot 1881 g. – Izvestiya na darzhavnite arhivi, kn. 64: 201-232].

**Питеков, И., 2010.** [Pitekov, I.] *Тютюневата история на България 1909-2009.* София [Tyutyunevata istoriya na Balmariya 1909-2009. Sofiya].

**Поп Антоv, Хр., 2006.** [Pop Antov, Hr.] *Спомени.* Скопје [Spomeni. Skopje].

**Първева, Ст., 2011.** [Parveva, St.] *Земята и хората през XVII – първите десетилетия на XVIII век. Овладяване и организация на аграрното и социалното пространство в Централните и Южните Балкани под османска власт.* София: Академично издателство „Проф. Марин Дринов“ [Zemyata i horata prez HVII – parvite desetiletia na HVIII vek. Ovladyavane i organizatsiya na agrarnoto i sotsialnoto prostranstvo v Tsentralnite i Yuzhnite Balkani pod osmanska vlast. Sofiya: Akademichno izdatelstvo „Prof. Marin Drinov“].

**Тодорова, М., (съст.), 1987.** [Todorova, M.] *Английски пътеписи за Балканите (края на XVI – 30-те год. на XIX в.,* София: Наука и изкуство [Angliyski paterpisi za Balkanite (kraя na XVI – 30-te god. na XIX v., Sofiya: Nauka i izkustvo)].

**Цветкова, Б., (съст.), 1981.** [Tsvetkova, B.] *Френски пътеписи за Балканите, XIX в.* София: Наука и изкуство [Frenski paterpisi za Balkanite, XIX v. Sofiya: Nauka i izkustvo].

**Ядков, Д., 2003.** [Yadkov, D.] *Булгартабак. Спомени,* София: Сибия [Bulgartabak. Spomeni, Sofiya: Sibiya].

**Якоч, Д., 2005.** [Yakoch, D.] Балканските обичаи в книгата на Келемен Микеш „Писма от Турция“. – *Балканистичен форум*, кн. 1-2: 66-72 [Balkanskite obichai v knigata na Kelemen Mikesh „Pisma ot Turtsiya“. – Balkanistischen forum, kn. 1-2: 66-72).

**Жоржета Назърска**  
**УниБИТ**

*Georgeta Nazarska*  
*University of Library Studies and Information Technologies (Bulgaria)*  
*[nazarska@abv.bg]*

## **Емигранти, пътешественици и бегълци: семејство Хайдutowи между Запада и Истока**

**Abstract:** *The article examines the migrations of young Bulgarians abroad in the 1920-1930s, caused by the Great Depression and in particular the labor migrations of Bulgarian musicians in Egypt and the Near East and their cultural and social interactions with the Bulgarian diaspora there and with the local population. The focus of the study is the travels of the Haidutov family – a musical trio that has made a living in Egypt for many years, and in the 1920s-1930s traveled and gave concerts in Argentina, France, Italy, Germany, Belgium, Switzerland, Australia and Java island, then returned to Bulgaria and re-emigrated to Egypt. The text analyzes how their mobility is facilitated by blood-related networks, professional networks and interest networks, how it enables their nationalism to interact with the international environment, and how they perceive the West and the East (Orient) as traveling people through their own cultural stereotypes and social distances. The fate of the violinist Nedyalka Simeonova – the daughter-in-law in the family and a member of the musical trio – is traced in detail.*

**Key words:** *labour migrations; Haidutov family; music; cultural stereotypes; Java island; Egypt*

### **Увод**

В статията се проучват миграциите на млади българи в чужбина през 20-30-те год. на XX в., предизвикани от Великата депресия и по-конкретно – трудовите миграции на музиканти в Египет и Близкия изток и техните културни и социални взаимодействия с българската колония и с местното население там.

Акцент в историческото проучване въз основа на архивна документация са пътуванията на сем. Хайдutowи – музикално трио, което дълги години намира препитание в Египет, а през 20-30-те

год. на ХХ в. са пътуващи музиканти в Аржентина, Франция, Италия, Германия, Белгия, Швейцария, Австралия и о. Ява, след което се завръщат в България и отново реемигрират в Египет.

В текста се проследява тяхната мобилност, улеснена от кръвно-родствени мрежи, професионални мрежи и мрежи по интереси; срещата на техния национализъм с интернационалната среда; възприятията им на „пътуващи хора“ към Запада и Изтока (Ориента), пречупени през призмата на собствените им културни стереотипи и социални дистанции. Отделено е внимание на цигуларката Недялка Симеонова – снаха в семейството и членуваща в музикалното трио.

### 1. Сем. Хайдудови в емигрантска среда

От началото на 20-те год. на ХХ в. сем. Хайдудови се заселва в Кайро – космополитен град и място, което избират заради добрия климат и възможности за работа<sup>1</sup>. Майката Елена (1878/1879-?) е бивша певица, но разчита на издръжката от двете си деца, последвали нейния професионален път. Георги Хайдудов е роден на 6 август 1896 г. в Сливен<sup>2</sup> и, макар да няма завършено формално образование, гради кариера на пианист. Сестра му Вера (1908-?) се дипломира в Кралската музикална академия в Лондон, свири на чело и на ударни инструменти, но се прехранва като учителка по пиано<sup>3</sup>.

Семейството живее сред малобройната българска колония в Египет, наброяваща около 450 души от български, турски, еврейски, арменки, руски, влашки и гръцки произход. Тя включва предимно занаятчии, търговци, духовници, но и постоянно мигриращи хора на изкуството – художници, артисти, вариететни изпълнители. През 20-30-те год. на ХХ в. в Египет и Близкия изток гастролират немалко български музиканти<sup>4</sup>.

През септември 1926 г. в търсене на по-добри доходи семейството емигрира в Бразилия и Аржентина. През септември 1928 г. в Буенос Айрес Георги се жени за Недялка Симеонова, с която се за-

<sup>1</sup> ЦДА, ф. 368к, оп.1, а.е. 118, л. 1.

<sup>2</sup> Внук е на Минко Хайдудов – произхождащ от с. Градец, търговец на пчелен восък с участие в Лондонското световно изложение (1907). Има сведения, че баща му Димитър живее в Англия и преди смъртта си през 1933 г. оставя собственост в Танганайка (дн. Танзания) – британска подмандатна територия.

<sup>3</sup> ЦДА, ф. 368к, оп.1, а.е. 61, л. 42; а.е. 18, л. 22; ф. 328к, оп.1, а.е. 157, л. 130, 135; а.е. 177, л. 286; ф. 328к, оп.1, а.е. 148, л. 57.

<sup>4</sup> Пак там, ф. 368к, оп.3, а.е. 11.



познава в Кайро и която става част от новосформираното музикално Трио „Хайдутови“.



*Сем. Хайдутови, Сидни, Австралия, 1929<sup>5</sup>*

## 2. Недялка Симеонова – дългият път към Египет

Недялка Симеонова е родена през 1901 г. в Хасково. По-късно семейството се мести в София, където баща ѝ Димитър започва работа като цигулар в Царския гвардейски оркестър и където тя се качва на сцена като надарено дете. През 1911 г. с подкрепата на Дончо Атанасов – стопански деец и масон<sup>6</sup>, бащата и дъщерята пристигат в Бостън<sup>7</sup>, където Недялка е прослушана от известния цигулар Йожен Изаи и взема частни уроци при именития преподавател проф. Леополд Ауер (Bulletin 1920). През есента на 1913 г. момичето изнася серия благотворителни концерти в САЩ – част от външнополитическата пропаганда в полза на българските бежанци.

<sup>5</sup> Пак там, ф. 328к, оп. 1, а.е. 156, л. 56, 334-336 гр.

<sup>6</sup> Богданов 1994: 8, 91. Най-вероятно Д. Симеонов е също масон – в Хасково има тайна организация от преди Освобождението, а след него центърът е Читалище „Заря“. Той поддържа дългогодишна връзка с проф. Асен Златаров – председател на Хасковската дружба в София и масон.

<sup>7</sup> Бостън е известен масонски център в САЩ.

През 1914-1920 г. учи в Дрезден при Лаура Карер-Раполди<sup>8</sup> и Густав Хавеман, а след края на войната се връща при Леополд Ауер в Ню Йорк<sup>9</sup>. По време на обучението си (1920-1922) свири с Бостънския симфоничен оркестър, в колежа „Вазар“ и др. (Boston Symphony Orchestra 1922: 49; The Musical Courier 1922; Vassar Quarterly 1921).

През 1924 г. сем. Симеонови се премества в Индианапълис, щата Индиана, попълвайки многобройната българска колония от бежанци от Македония. Скоро бащата – импресарио на Недялка, я запознава с индиеца Премел ел Адарос. В писмо до българите в Америка той горещо им препоръчва индуса, представящ се за „свещен учител“ (The Book 1924: 124). Астролог и търговец на кристали и парфюми, Адарос е основател на Дружество за трансцендентална наука в Чикаго<sup>10</sup> – с теософски характер и седалище в сградата на местния масонски храм<sup>11</sup>. Наричан „учителят от Ориента“, организира дистанционни курсове по индийски спиритуализъм, хипноза, йога, ритуален окултизъм, червена магия, християнски мистицизъм и др., има собствено издателство и пише книги. Той твърди, че възражда забраненото знание за древните и езотеричните учени, занимава се с мистерии, френология, алхимия, а в текстовете му са видими влиянията на вайшнавизма, масонството, розенкройцерството и кабализма. В едната от книгите си Адарос публикува писмо, в което Недялка твърди, че е вдъхновена от трансцендентната наука, защото издига хората над „тесните граници“ на техните „земни усилия“ и им дава вместо алчност и плътска страст всемогъщата трансцендентна любов и концепцията за Вечната истина (The Book 1924: 7)<sup>12</sup>.

През юни 1924 г. двамата сключват граждански брак и, макар през есента на 1925 г. американските вестници да съобщават, че съпругата се готви за развод, през 1926 г. тя ражда в Чикаго сина си Георги-Борислав (The Daily Notes 1925: 5). В края на с.г. семейство-

<sup>8</sup> Лаура Карер-Раполди е ученичка на Лист, който заедно с Вагнер е част от т.нар. Ваймарска школа, базирана на езотерична основа.

<sup>9</sup> ДА-Хасково, ф. 1851, оп.1, а.е. 26, л. 1-2.

<sup>10</sup> Чикаго е известен теософски център в САЩ, в който е проведен теософски конгрес (1889) и Джинарадждаса чете цикъл от лекции (1910).

<sup>11</sup> В неговите зали са организирани много концерти, което е възможен повод за запознанството.

<sup>12</sup> Нейните занимания със спиритизъм продължават и през 1942 г. заедно с музикантите Л. Енчева, Л. Пипков, Д. Ненов, Л. Велич и Т. Мазаров (Симеонов 2018: 8-9).

то пристига в Кайро, където Адарос развива широка окултна дейност. По неясни причини там двамата се разделят: Недялка с пеленаче на ръце избягва от дома, обвинявайки съпруга си в насилие и отказ за издръжка<sup>13</sup>.



*Недялка със своето дете<sup>14</sup>*

*Писмо на Н. Симеонова до консул М. Попов, 27.08.1926, Кайро<sup>15</sup>*

Възможно е именно на сеансите на индиеца или в местното Теософско общество Недялка да се запознава с музикантите Хайдутови. В кореспонденцията на Георги остават загадъчни както появата на майката с детето, така и желанието на фамилията да ѝ помогне на всяка цена и „да я защитят от съпруга ѝ“, „под наш надзор и ни има като свои“. Те я настаняват и заплащат хотела ѝ, издействат ѝ паспорт в нарушение на законовите разпоредби, вземат я със себе си в пътуването към Бразилия и Аржентина през есента на 1926 г., позволяват ѝ да остане с тях, вместо както е планирала – в САЩ при родителите си. И всичко това с обяснението: „Не искаме един такъв

<sup>13</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 159. Този случай е описван абсолютно неточно по спомени. Д. Симеонов (2018: 82) смята, че понеже бащата бил несъгласен с брака, отвел дъщеря си в Египет, а според Г. Минчева (2006) Адарос я отвлякъл в Египет. След 1926 г. той се връща в Ню Йорк, като акцентира върху новата си мюсюлманска идентичност (Абд-ел Рахман ел Адарос ефенди) и търси повече клиенти след чернокожите (Вж. Bowen 2015: 210).

<sup>14</sup> ЦДА, ф. 491к, оп.1, а.е. 11, л. 1.

<sup>15</sup> Пак там, ф. 328к, оп.1, а.е. 148, л. 159.

талант – българска гордост, да попадне в чужди ръце“. През септември 1928 г. Недялка Симеонова и Георги Хайдutow се венчават в руската православна църква в Буенос Айрес<sup>16</sup>.

### 3. „Четиримата български скитници“ в околосветски миграции

През декември 1928 – януари 1929 г. Хайдutowи правят опит да се преместят в Западна Европа. Миграциите им са вследствие на Великата депресия и на рестрикциите за работа, наложени срещу чужденци.



*Паспортни снимки на Хайдutowи и Симеонова, 1926<sup>17</sup>*

От Буенос Айрес отпътуват за Франция, но след двуседмичен престой в Париж, където не им издават работни визи, се прехвърлят в Италия. В Милано установяват, че за чужденци като тях животът ще е твърде скъп. Затова тръгват към Берлин, където са разочаровани от натоварването на музикантите, принудени да свирят в заведенията до 4 ч. сутринта. Това прави невъзможни плановете на Георги да се запише в Музикалната академия и фамилията се насочва към Белгия и Швейцария.

През януари 1929 г. се установяват за кратко в Пърт и Мелбърн, Австралия. Работят седмица в Кинотеатър „Тиволи“ в Сидни, облечени с национални костюми и озвучавайки неми филми между антрактите.

<sup>16</sup> Пак там, л. 156-156 гр., 157-157 гр., 158-158 гр.

<sup>17</sup> ЦДА, ф. 328к, оп. 1, а.е. 156, л. 40 гр., 42 гр.



*Трио „Хайдутови“ в Берлин, вер. 1928<sup>18</sup>*



*Трио „Хайдутови“ с чуждестранни колеги, вер. 1929-1930<sup>19</sup>*

Впоследствие решават да се прехвърлят на о. Ява – 40-милионна холанска колония<sup>20</sup>. Заселват се във Велтевреден – един от кварталите на Батавия (дн. Джакарта)<sup>21</sup>. Дошли като туристи, след седмица Хайдутови сключват договор, въпреки неблагоприят-

<sup>18</sup> Пак там, ф. 491к, оп.1, а.е. 15, л. 2.

<sup>19</sup> Пак там, л. 1.

<sup>20</sup> Пак там, ф. 328к, оп.1, а.е. 148, л. 120-122.

<sup>21</sup> Пак там, а.е.143, л. 131; а.е. 148, л. 120-122; а.е. 156, л. 38, 43, 49-53, 334-336 гр.

ните условия и работят там една година (март 1929 – средата 1930) под името Българско трио „Хайдutowи“.

Георги се оплаква от дъждовното време („най-лошото време за музикантите“), но то може да се пренебрегне на фона на сериозното бедствие за музикалната гилдия – налагането на озвучените филми, с което отпада нуждата от оркестри към кинозалоните<sup>22</sup>. Българското трио свири от 19-21 ч. в кината „Maison Coesel“ и „Maison Versteeg“ срещу сравнително високо заплащане, в театър „Roxy“, на терасата в градската градина, веднъж месечно в радиото и на балоните на Германския и Холандския клуб „Хармони“<sup>23</sup>. Имат голям успех в изпълнението на джаз и на класически репероар – произведения на Монти, Сарасате, Флотов, Бизе, Албениз, Брамс и др.<sup>24</sup>.

В местно заведение се запознават с руснака Шчербович – запасен полковник и свещеник, завършил духовна семинария в Париж. Той обгрижва 25-членната руска колония и служи в домашния си параклис. Освен че е духовно лице, той членува в Теософското общество на Батавия, включващо помощник-губернатора, двама министри (вкл. на труда), архиепископа и висши явански сановници. Хайдutowи са поканени да свирят на дружествена сбирка, вероятно и заради собствената си свързаност с теософските и масонските среди. Обикновено настроен меркантилно, ръководителят на състава се съгласява да работят без пари, отбелязвайки, че „всичко това го правим за реклама на нашата музика“, „ако ни харесат, ще ни викат често, а може би и да ни помогнат с нещо“<sup>25</sup>. Макар да е доволен, че са си осигурили „завидно положение“, в крайна сметка триото изнася само един концерт пред теософите през март 1930 г.<sup>26</sup>

#### **4. Междукултурните „оптики“ на един музикант: „широк свят, разни народи, разни нрави!“<sup>27</sup>**

Пътувайки по света, Георги Хайдutow си пише постоянно с Милан Попов – български консул в Египет и негов близък приятел.

<sup>22</sup> Пак там, а.е. 148, л. 101-103.

<sup>23</sup> Пак там, л. 101-103.

<sup>24</sup> Пак там, л. 69.

<sup>25</sup> Пак там, л. 105-106.

<sup>26</sup> Пак там, л. 91.

<sup>27</sup> Пак там, л. 55.

Тясната им връзка<sup>28</sup> предразполага за споделяне на лични възгледи и преценки, за обсъждане на редица културни характеристики и национални специфики на хората, с които го среща професията и с които общува вследствие на трудовите си миграции. Тези разсъждения могат да бъдат разглеждани както като отражение на собствения жизнен опит на музиканта, така и анализирани през призмата на колониалната теория (Саид 1999). Формулирани в духа на ориентализма, те най-често са базирани на негативни етнически стереотипи, издават расистки и антисемитски настроения и показват сериозната му непоносимост към чуждата култура.

Почти винаги Хайдutow преценява дадена страна, свързвайки нейните природни дадености с характеристиките на населението. Според него Австралия е „много хубава“, с отличен климат, птици и растения, с чисти градове, но е всъщност „красива страна с некултурни хора“<sup>29</sup>. Там се срещат не само „ужасни пияници“, много безработни или постоянно стачкуващи, но най-вече липсва интерес към културата: музикантите са слабо платени и почти нямат работа, не съществуват опера, оперета и симфонични оркестри. Изобщо, обобщава той: „особени нрави [...] има в тази страна“<sup>30</sup>. По същата схема са преценени италианците и Италия: „не са хора за уважение“, „големи самохвалци са и ненавиждат чужденците“, „ужасно нахален народ са [...] Загубена страна е!“<sup>31</sup>.



*Георги, Недялка и Вера Хайдutowи и борецът Петър Ферещанов в народни носии, Буенос Айрес, Аржентина, 1926<sup>32</sup>*

<sup>28</sup> Възможно е тя да е споена с общото им членство в масонска ложа в Кайро. Милан Попов е дипломат от кариерата, дългогодишен консул в Битоля, Солун, Бейрут, Александрия и др.

<sup>29</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 334.

<sup>30</sup> Пак там, л. 334 гр.- 335 гр.

<sup>31</sup> Пак там, л. 72-73.

<sup>32</sup> [www.prowrestlingBulgaria.blogspot.com](http://www.prowrestlingBulgaria.blogspot.com)

В писмата си Хайдutow сочи о. Ява като ключов за търговията в Далечния изток, като най-богатия и най-красивия от всички на света. Първоначално изпитва възхищение от природата му, впечатлен от тропическите растения, плодове и зеленчуци<sup>33</sup>, но скоро разказва как от местната храна е получил камъни в бъбреците и как климатът в новата страна е пагубен, особено за европейците („Ява е много противен [остров], само тревоги ни дава, здравето си съсипваме“<sup>34</sup>). Той образно описва дъждовния сезон при жегата от 42 градуса<sup>35</sup> („много е интересен този сезон тук!“<sup>36</sup>), но непрестанно го сравнява с по-благоприятните условия в Египет, с които е свикнал, и наблягайки на урбанизацията от колониален тип: „при това Египет е съсед с Европа и доста приятно се живее там“<sup>37</sup>. Лошото време разболява всички в семейството: Вера и Георги боледуват от тропическа инфлуенца, а всички – от анемия<sup>38</sup>. Обобщавайки, че, „в тропиците почти всички европейци страдат от болести, особено мъжете“, Хайдutow заключава, че именно заради неблагоприятния климат и въпреки добрата печалба<sup>39</sup>, ще се наложи „по неволя ще напуснат страната“.

Освен географските характеристики, семейството е привлечено от забележителностите на новото място. Симптоматична е обаче тяхната „колонизаторска“ перспектива към местната културна среда. Според Хайдutow, въпреки много разкопки и изследвания и интересните „неща за гледане“ (останки от дворци и къщи), явайската култура е „тъмна“<sup>40</sup>. Той особено много съжालява, че заради икономии няма възможност да посети 108-метровата пирамида, „подобна такава, както египетската“<sup>41</sup> [...] – доказвайки, че тук някога, дори много по-рано от египетската история, е съществувал живот, доста интересен, но неизвестен още за нас, европейците, поради оскъдните писмени доказателства“<sup>42</sup>. „Никакви удоволствия нямаме – пише

<sup>33</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 69.

<sup>34</sup> Пак там, л. 104.

<sup>35</sup> Пак там, л. 51.

<sup>36</sup> Пак там, л. 105.

<sup>37</sup> Пак там, л. 107.

<sup>38</sup> Пак там, л. 101-103.

<sup>39</sup> Пак там, л. 59-60.

<sup>40</sup> Пак там, л. 68.

<sup>41</sup> Това показва косвено масонската му принадлежност. За посветения масон е въпрос на престиж да посети и да се снима пред подобно съоръжение.

<sup>42</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 88-90.



той – сегиз-тогиз ходим на интересния Етнографски музей и аквариума. В музея [...] има богати колекции от Ориента и пари от цял свят [...], златни украшения, събрани от разните провинции на Ява, Суматра и другите острови. Разкошни диаманти, рубини и пр. красят така също, както и пушки сребърни, сабли, корони, столове, чадъри и пр., всичко от злато и скъпоценни камъни<sup>43</sup>. Фокусирани върху професията си, Хайдутови с интерес наблюдават есенния годишен панаир с „големи чудесии“<sup>44</sup>. В тази градска изложба участват явайски национални театри, организират се изложби, показват се оръжие, добитък, растения. Изобщо пазарът се превръща във „вълшебен градец от 1001 нощ“ и затова „наистина беше интересно да се види каквото в Европа или другаде едва ли ще се срещне“<sup>45</sup>.

Независимо от романтичната му визия за Ява, наблюденията на музиканта над местното население никак не са позитивни. Макар да е една от най-богатите държави в света, „в Ява много малко се работи“, пише Хайдутов, и добавя: „тук добре живеят китайци, японци, индийци, араби, въобще ориенталските народи – не се отличат като нас в смокинг и тежки дрехи въобще, а просто ходят боси, полуголи или облечени с леко облекло – бедни и богати. Ние, европейците, сме много непрактични хора!“<sup>46</sup>. Облеклото е постоянно във фокуса на неговите разсъждения. Фактът, че местното население ходи босо и полуголо, „дори богатите китайци – по долни дълги гащи, а пък с европейска шапка“, го кара да възкликне: „странна страна, странни хора и интересен живот!“<sup>47</sup>. Отначало той описва малайците като „доста добри и тихи, послушни и уважават европейците“, но скоро мнението му се променя: „с малайците и дума не може да става за запознаване, поради тяхната простация и непознаване друг език, освен техния – приличен нещо на между абисински и арабски езици“<sup>48</sup>. Допълнителен аргумент за маргинализация на културния Друг е свързането му с американците: „Ява е жертва на американската тенденция – старо и младо танцува, класическата музика полека-лека изостава“<sup>49</sup>.

---

<sup>43</sup> Пак там, л. 104-105.

<sup>44</sup> Пак там, л. 55.

<sup>45</sup> Пак там, л. 49.

<sup>46</sup> Пак там, л. 67, 88-89.

<sup>47</sup> Пак там, л. 68.

<sup>48</sup> Пак там, л. 61.

<sup>49</sup> Пак там, л. 104.



*Трио „Хайдутови“ с местни музиканти в Батавия, о. Ява, 1929-1930<sup>50</sup>*

Тази дистанцираност не може да се сравни обаче с негативните му чувства към китайците и индийците, които са портретирани като „проклет народ, правят скандали и ненавиждат европейците. За жалост, най-богатите хора са китайците“, защото са „царе на чая и ориза“. Според него „тежко и горко, ако желите и локалите очакваха клиенти от китайците, японците, местните или от индийците. Всички тези [...] са ужасно егоистичен народ, живеят само за себе си, събират се само по частни къщи и там се веселят до късно – имат си своя, ориенталска музика“<sup>51</sup>. В друго писмо Хайдутов разказва как го разсмял парадът в чест на сиамския крал – „китайска мутра, нисък и с извънредно глупав поглед“, употребяващ „много опиум, като всеки китаец или ориенталец от Далечния изток“ и затова „не доста умен и интелигентен“<sup>52</sup>.

Не по-малко язвителен е Хайдутов и към холандците. Единственото, което одобрява у тях, е, че са „добре завладели острова и владее голям ред“<sup>53</sup>. „Затова и тук няма европейска работна емиграция [...] Ява е една голяма експлоатационна страна! Страна на ту-

<sup>50</sup> Пак там, ф. 491к, оп.1, а.е. 15, л. 14.

<sup>51</sup> Пак там, ф. 328к, оп.1, а.е. 148, л. 88-90.

<sup>52</sup> Пак там, л. 55.

<sup>53</sup> Пак там, л. 69.

ристите!<sup>54</sup>, отбелязва той и продължава: „холандското правителство има нужда от тях [явайците], понеже им плащат големи данъци, работят за по-евтино и конкурират с цените на произведенията си“<sup>55</sup>. Същевременно обаче нравите на колонизаторите представляват сериозно предизвикателство пред патриархалния му светоглед: „има голяма корупция между черните и холандците. Жените от обществото ходят без чорапи и пушат на открито цигари! Цивилизация голяма! Втора Франция, Аргентина и Германия! Зер страната е богата и има много пари за излишни работи!“<sup>56</sup>. В неговата ценностна йерархия те са сравнени с други „некултурни“ народи: „Обаче, ето какво мнение имаме за холандците. Големи търговци, техници до нейде, обичат да подражават на англичаните и североамериканците и са големи самомнителни, както и простаци. Много си приличат с англичаните и южноамериканците. Любезни са до „лицемерие“, докато не ги настъпи някой до болното им място“<sup>57</sup>.

Хайдutowи се заселват в европейския квартал на Батавия – „доста интересен, ориенталски град“, населен с малайци, китайци и араби<sup>58</sup>. „Живеем затворен живот [...] никакви познанства нямаме [...], поради трудния холандски език“<sup>59</sup>, пише главата на семейството, обяснявайки всъщност особената „оптика“ на своите възприятия. Културната капсулация на семейството се налага и по други причини: „[в града] няма европейци работници или земеделци [...], тъй като трудът е евтин, много евтин, от местните малайци. Китайците са много и са занаятчии и дребни еснафи, много араби, японци, индуси и еврей“. Малкото европейци, които идват на острова, са предимно туристи от Англия и Германия: „и тогава хотели, ресторати и други локални се раздвижват, както и по улиците, и градът приема веднага празничен вид; иначе местните европейци излизат само нощем и посещават локалите само до 10 ч., след което настава тишина – всички се прибират дома си“<sup>60</sup>.

Ограничените социални контакти с мигранти от Стария континент вероятно представляват предпоставка Хайдutow да не изявява

---

<sup>54</sup> Пак там, л. 88-90.

<sup>55</sup> Пак там.

<sup>56</sup> Пак там, л. 56.

<sup>57</sup> Пак там, л. 50-51.

<sup>58</sup> Пак там, л. 67.

<sup>59</sup> Пак там, л. 61.

<sup>60</sup> Пак там, л. 88-90.

толкова европейската си идентичност вместо своята етническа и национална.

Спорадичните срещи с руската колония в домашния параклис на теософа Шербович подтикват Хайдutow да разсъждава върху мястото на евреите в яванското общество. Макар те също да са имигранти, според него те се увеличават с времето („наброяват 150 хиляди, само в Батавия са 30 хил., повечето холандци, немци, французи, белгийци, англичани, болшинството от които са чифути! Навсякъде вече тази еврейска раса се е навъдила, която е завладяла вече световните пазари!“<sup>61</sup>) и имат привилегирована позиция („в Ява 95% от този род професия [музикантката] са чифути от Русия, Германия и Холандия“). Особено възмутително за пианиста е, че те накръняват неговите патриотични нагласи и християнска принадлежност: „бълват глисти, когато се говори за нас“; „Всички отначало ни смятаха за „свои“, затова ни посрещаха с думите „Вы русский! [Руснак ли сте?]“. Разбира се, стана им неприятно, когато им отговорих, че съм българин, и то християнин, а не „жид пархатый [крастав евреин]“<sup>62</sup>. Основания за неговия силен антисемитизъм са формираните десни политически възгледи и консервативните му, патриархални обществени настроения: „Истинските холандци музиканти са военните музиканти, са добри хора, но „чифутите“ – Бог да ги поразит, никъде не ще срещнете толкова много „чифути“, както тук. Всички почти европейски магазини, кина, театри са в техни ръце. Тази проклета раса не заслужава да се наричат и евреи – просто чифути, толкова много ги мразя!“<sup>63</sup>. Освен това, откровението му „ужасно ненавиждам тази проклета раса!“<sup>64</sup> се мотивира и икономически: „евреите са чиновници, управници, офицери, артисти, служители на много търговски къщи, тъй че няма да срещнете бедни евреи“<sup>65</sup>. Това е недвусмислено указание, че антисемитизмът на Хайдutow е формиран в небългарска среда и показва сходства с германския, руския и румънския. Възможно е контекстът му да са също така националистическите идеи – характерни за цялото му поколение и неведнъж развивани от младия мъж в кореспонденцията му с По-

<sup>61</sup> Пак там, л. 67.

<sup>62</sup> Пак там, л. 60. Лексиката на Хайдutow съчетава балкански и руски обидни названия за евреите.

<sup>63</sup> Пак там.

<sup>64</sup> Пак там, л. 67.

<sup>65</sup> Пак там, л. 68.

пов<sup>66</sup>. Той особено се афектира от „невидимостта“ на българите в културния пейзаж и смята това за „невежество“, разпространено в Австралия, но „дори и в Европа!“: „Мнозина интелигентни хора не знаеха нищо за нас, българите, но аз добре ги наредих“; „Много ни мислят, че сме се намирали в Русия или сме немска раса, или че сме чехословаки и не знам що си! Още много свят ще тъне в невежество и простотия!“<sup>67</sup>. Хората, които объркват националността на триото, наричайки ги „Ungarisch“, без колебание са наредени след тях: „дори някои интелигентни (?) господа ми казаха: ха, ние сме били във Вашата столица Будапеща! Да знаете как ме нервира това тяхно невежество [...] Трябва винаги да им обяснявам, че ние сме нация и имаме история. Можете си обясни какво голямо невежество царува дори в Холандия, дето се претендира, че били многознаещи“<sup>68</sup>.

Хайдутов се възхищава на самоорганизацията на руската колония („Ах! Колко бих желал това да срещна в такива страни, дето имаме доста емиграция – наша църква, библиотека, клубове. Уви! За жалост ние, българите, в далечните страни нямаме тази инициатива“<sup>69</sup>) и със сравнението обосновава собствена визия за външнополитическа културна дипломация: „Мисля, че България има нужда от пропагандисти в чужбина, било с музика, театър, спорт и журналистика, за да докажем на света, че нашата малка и онеправдана България има своя култура, свои учени, свои гении, наравно дори повече от тези в Европа и Америка, които така малко я познават[...] В Париж, Берлин, Брюксел, Лондон и Рим никой българин в последно време не се е подвизавал[...] Нямаме клубове от национален характер за даване концерти, вечеринки, издаване вестници на два езика, литературни списания и пр., и пр.“<sup>70</sup>.

Давайки изява на своята национална идентичност, Хайдутов и неговите най-близки роднини наричат музикалната си формация „Българско трио“ и в чуждестранна среда неизменно концертират в национални носии<sup>71</sup>.

---

<sup>66</sup> Не е изключено преди да емигрира в Египет Хайдутов да е членувал в някоя от десните политически „патриотични“ формации в страната.

<sup>67</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 73.

<sup>68</sup> Пак там, л. 50-51.

<sup>69</sup> Пак там, л. 105.

<sup>70</sup> Пак там, л. 70-71.

<sup>71</sup> Демонстрацията на традиционно облекло, особено на световни конгреси и др. форуми, става популярна практика между двете световни войни, силно подкрепяна от пацифистките организации. Тя намира разпространение и сред



*Трио „Хайдутови“ в народни носии, Батавия, 1929 – реклама в явайски вестник<sup>72</sup>*

### 5. Реемиграциите на Хайдутови

Първоначално семейството не прави планове за завръщане, тъй като „България е много бедна“ и изчаква да „се поправи положението“<sup>73</sup>. Хайдутов философски приема, че това е „животът на четирима български скитници“<sup>74</sup>. През 1930 г. обаче, неясно по какви причини, е взето друго решение – дали заради спад в ангажиментите по време на Великата депресия, дали вследствие здравословни проблеми от тежкия климат<sup>75</sup>.

На 1 юли 1930 г. с презокеанския параход „Саабрюкен“ фамилията акостира в Порт Саид. През 1932 г. при раждането на сина си Димитър<sup>76</sup> Недялка и Георги Хайдутови се връщат в България. Пред българската преса те представят своя печален гурбет в чужбина като „успешно турне в Америка“ (Утринна поща 1932: №1363) и преди развода си свирят в курортните заведения в Горна баня, концертират из страната.

---

музикантите и музиковедите, вкл. българските. „Българският стил“ в облеклото и интериорния дизайн, който трябва да покаже „родното“ и използващ широко шевици и фолклорни мотиви, става доминиращ в националната мода и бит през 20-40-те години.

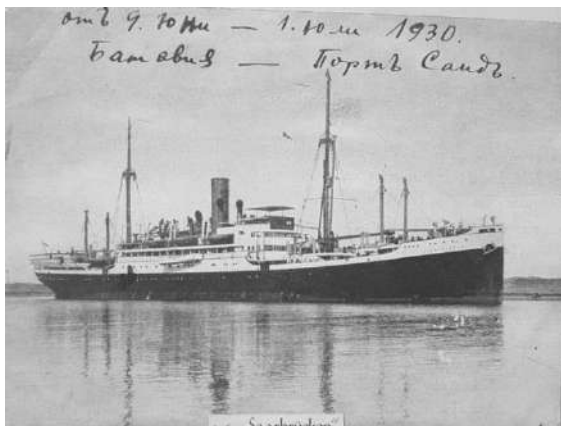
<sup>72</sup> Het nieuws 1929.

<sup>73</sup> ЦДА, ф. 328к, оп.1, а.е. 148, л. 69.

<sup>74</sup> Пак там, л. 107.

<sup>75</sup> Възможно е по това време да е починало от дизентерия детето на Недялка.

<sup>76</sup> Димитър Симеонов (1932-2019) – музикант, джазмен, саксофонист, преподавател в Музикалната академия, ръководител на оркестър „София“, работи в Халеб (Сирия, 1965) и Куба (1967).



*Презокеанският параход „Саабрюкен“, с който Хайдутови се връщат в Порт Сауд, 09.06.-01.07.1930<sup>77</sup>*

През 1933 г. цигуларката става концертмайсторка в Кооперативния театър (1933-1939) и салонния оркестър на Радио София (след 1939) (Утринна поща 1932: №1370, Утринна поща 1937: №2471; Радославова 2010: 162). Изнася самостоятелни концерти в Хасково и София (1937-1940), сформира трио с пианистката Донка Куртева и виолончелиста Светослав Марчинков (1939-1941), изявява се често в радиопрограми, дава частни уроци (Утринна поща 1937: №2471, №2478; Утринна поща 1938: №2579, №2580; Хасковски новини 1937: №22; Радославова 2020: 66-67, 133, 145, 162, 239, 243). През 1935 г. в София е честван 25-годишният ѝ творчески юбилей и е награден с орден „Дамски кръст“ (Хасковски глас 1935: №19). През 30-те години Симеонова е хонорувана лекторка в Държавната музикална академия (1937-1939), работи в Германия, където довършва образованието си в Дрезденската консерватория (1938) и е концертмайстор на местната филхармония (1941-1942), свири в Белградския симфоничен оркестър (1940) (Симеонов 2018: 83). След 1944 г. прави успешна кариера: повишена е от редовна преподавателка в извънреден (1946) и редовен професор (1948) в Музикалната академия, награден е с Димитровска награда и звание „заслужил артист“ (1950) (Работническо дело 1950: №134). Концертира в Хасково, Ст. Загора, Москва, Белград, Сараево и Нови сад (1951-1955) (Родопска борба 1951: №336; Работническо дело 1954: №251, №256, №291; Отечествен фронт 1955: №3223, №3224, №3226). Пише теоретични трудове по музикална педагогика (1947-1957)<sup>78</sup>. Почива след лечение в Париж през март 1959 г. (Отечествен фронт 1959: №4526; Труд 1959: №64).

След 1932 г. Елена и Вера Хайдутови остават да живеят в Кайро, където осигуряват прехраната си с музикалните уроци, давани от

<sup>77</sup> ЦДА, ф. 491к, оп.1, а.е. 19, л. 1.

<sup>78</sup> ДА-Хасково, ф. 1851, оп.1, а.е. 11-18.

дъщерята<sup>79</sup>. След 1933 г. Георги решава да се върне в Египет, убеден, че „трудно живее в Европа“, но среща отказ от полицията. След неуспешен опит за самоубийство, едва през 1940 г. пристига в Александрия<sup>80</sup>. Оттам заедно с втората си съпруга заминава за Венецуела<sup>81</sup>, където работи и живее в Каракас до смъртта си през 1984 г. (Симеонов: 5, 39, 53).

### Заклучение

Описаните в статията миграции на музиканти през междувоенния период се вписват в нарасналата мобилност на младежта в световен план след Първата световна война. В частност те са пример както за търсене на професионална реализация на неексплоатирани трудови пазари изван Европа и Северна Америка, така и начин за опознаване на нови географски пространства и непознати култури.

Музикалното образование и занимания на Хайдутови и Симеонова улесняват тяхното предразположение към мобилност и отвореност към межкултурен диалог. Те участват в разнообразни социални мрежи – професионални, национални, по интереси, вкл. с окултен характер, които играят съществена роля в осъществяване на техните пътувания, турнета и гастроли.

В течение на своите миграции членовете на фамилията срещат културното различие в определени моменти и места, но решават по своему как да реагират. Ако при Н. Симеонова то е прието докрай и е сведено до къси дистанции чрез брака ѝ с Адарос и дългогодишното ѝ приятелство с американски и германски колеги, съпругът ѝ Г. Хайдутов не само че отхвърля вербално „другостта“, но предпочита да я атакува със средствата на етническият национализъм и на социалното изключване.

### Библиография:

**Богданов, Ив. 1994.** Синовете на вдовицата. Масонство и масони. София: УИ [Bogdanov, Iv. 1994. Sinovete na vdovitsata. Masonstvo i masoni. Sofia: University Press].

**Минчева, Г. 2006.** Спиритист отвлича цигуларата Н. Симеонова в Египет. – В: Монитор, 18.11.2006 [Mincheva, G. 2006. Spiritist otvlicha tsigularata N. Simeonova v Egipet. - In: Monitor, 18.11.2006]

<sup>79</sup> ЦДА, ф. 368к, оп.1, а.е. 18, л. 22; а.е. 61, л. 42; ф. 328к, оп.1, а.е. 157, л. 130, 135; а.е. 177, л. 286.

<sup>80</sup> Пак там, ф. 368к, оп.1, а.е. 118, л. 1; а.е. 196, л. 108, 117.

<sup>81</sup> Пак там, а.е. 196, л. 108, 117; ф. 328к, оп.1, а.е. 177, л. 290-291 гр.



Отечествен фронт. 1955. № 3223, 12.01.1955; № 3224, 13.01.1955; № 3226, 15.01.1955 [Otechestven front. 1955. № 3223, 12.01.1955; № 3224, 13.01.1955; № 3226, 15.01.1955].

Отечествен фронт. 1959. №4526, 17.03.1959 [Otechestven front. 1959. №4526, 17.03.1959].

Работническо дело. 1950. №134, 14.05.1950 [Rabotnichesko delo. 1950. №134, 14.05.1950].

Работническо дело. 1954. № 251, 08.09.1954; № 256, 13.09.1954; №291, 18.10.1954 [Rabotnichesko delo. 1954. № 251, 08.09.1954; № 256, 13.09.1954; №291, 18.10.1954].

**Радославова-Дойчева, А. 2010.** Музиката в Българското радио, 1930-1944. София: П и П. Славейкови [Radoslavova-Dojicheva, A. 2010. Muzikata v Balgarskoto radio, 1930-1944. Sofia: P. i P. Slavejkovi].

Родопска борба (Хасково). 1951. №336, 10.02.1951 [Rodopska borba (Khaskovo). 1951. №336, 10.02.1951].

**Саид, Е.** Ориентализмът. 1999. София: Кралица Маб [Said, E. Orientalism. 1999. Sofia: Kralitsa Mab].

**Симеонов, Д. 2018.** Живея за музиката. Автобиографията на един джазмен. Плевен: МедиаТех [Simeonov, D. 2018. Zhiveya za muzikata. Avtobiografiyata na edin dzhazmen. Pleven: Mediatekh].

Труд. 1959. №64, 17.03.1959 [Trud. 1959. №64, 17.03.1959].

Утринна поща (Хасково). 1932. №1363, 16.02.1932; №1370, 24.02.1932 [Utrinna poshta (Khaskovo). 1932. №1363, 16.02.1932; №1370, 24.02.1932].

Утринна поща (Хасково). 1937. №2471, 12.01.1937; №2478, 6.02.1937 [Utrinna poshta (Khaskovo). 1937. №2471, 12.01.1937; №2478, 6.02.1937].

Утринна поща (Хасково). 1938. № 2579, 25.01.1938; №2580, 29.01.1938 [Utrinna poshta (Khaskovo). 1938. № 2579, 25.01.1938; №2580, 29.01.1938].

Хасковски глас. 1935. №19, 9.03.1935 [Khaskovski glas. 1935. №19, 9.03.1935].

Хасковски новини. 1937. № 22, 9.06.1937 [Khaskovski novini. 1937. № 22, 9.06.1937].

Boston Symphony Orchestra. 1922. vol. 42.

**Bowen, P. D. 2015.** A History of Conversion to Islam in the United States, vol. 1. Brill.

Bulletin. 1920. Bulletin of the Women's City Club of Boston, vol. 7.

Het nieuws. 1929. Het nieuws van den dag voor Nederlandsch-Indië, №71, 27.03.1929

The Book. 1924. The Book of the Secret Word and the Higher Way to Fortune. Chicago: Society of Transcendent Science.

The Daily Notes (Canonsburg, Washington, Pennsylvania). 1925. 24.03.1925.

The Musical Courier. 1922. vol. 85.

Vassar Quarterly. 1921. vol. 7-8.

[www.prowrestlingBulgaria.blogspot.com](http://www.prowrestlingBulgaria.blogspot.com)

DOI: <https://doi.org/10.37708/bf.swu.v30i2.11>

*Радостина Нейкова*  
*Българска академия на науките*

*Radostina Neykova*  
*Bulgarian Academy of Science, Institute of Arts Studies*  
*[radostneykova@gmail.com]*

## **Пътуването в анимационното кино – между бягството и завръщането (Специфики на анимационната изразност)**

**Abstract:** *The journey in the animation cinema can be in many aspects - from fully real tracking of movement in space, through vertical or horizontal movement in the past, present and future, with or without a specific direction, to physical or psychological escape and / or return after time.*

*The text analyzes the specifics of travel, escape and return in key examples of modern animation cinema.*

*In animation, screen movement takes place in a specific space and for a specific time. And the first signal association for avoidance, for travel is precisely movement, movement in time and space. Of course, in animation cinema the movement is absolutely free and unlimited and can vary from fidelity to nature to abstraction and absurdity, it can manifest itself in a new quality of cinema - in the metaphorical image, in the creation of its own system of signs and symbols.*

**Key words:** *Animation; drawing; animated image; animation movement; animation timing and backgrounds*

Пътуването в анимационното кино може да бъде в много аспекти – от изцяло реално проследяване на придвижване в пространството, през вертикално или хоризонтално движение в минало, настояще и бъдеще, със или без определена посока, до физическо или психологическо бягство и/или завръщането след време. В настоящия текст спирам вниманието си на няколко интересни аспекта на пътуването в анимационното кино не само като начин на придвижване, но и като избягване, спасяване, изключване от действителността. И в същото време давам примери за обратния процес – зав-

ръщането към нещо минало, родно и мило, завръщане към себе си, завръщане към духовното.

В анимацията екранното движение се извършва в определено пространство и за определено време. А първосигналната асоциация за избягването, за пътуване е именно движение, придвижване във времето и пространството. Разбира се, в анимационото кино движението е абсолютно свободно и неограничено и може да варира от вяръност към натурата до абстракцията и абсурда, може да се прояви в ново качество на киното – в метафоричния образ, в създаването на собствена система от знаци и символи. В рисуваните филми често точните форми имат определено значение, но при абстрактни творби като тези на Викинг Егелинг смисълът е точно в движението на същите тези форми, които не наподобяват нищо. По този начин имаме едно „измъкване“, пътуване, или по-скоро потъване във визуалното преживяване на екрана, в богатството и пластиката на форми и обеми, на цветове и музика. В творчеството на Валтер Рутман движението също е подобно на музикална симфония. Подобен е филмът му „Берлин – симфония на големия град“ (1927) филм – портрет на Берлин, неговия динамичен живот и експресивна визия от двадесетте години на XX век. А режисьорът се опитва да пресъздаде дори събития от рода на инфлацията именно като чисто визуално явление, „като импресия“<sup>1</sup>. Това са филми, в които има само движение на линии, форми, петна..., а „смяната на „светлинните форми“ се превръща в „пластичен ритъм“<sup>2</sup> и в усещане за избягване, за изключване от действителността и поемане по вътрешния път на усещанията.

Съществуването на киното, както и на движещото се изображение, почива на принципа на обобщеното въздействие от различни перцепции у зрителя, на усещане за реалност, светлина, пространство, време, разстояние, събрани монтажно и смислово в екранното движещо се изображение. „Днес през екраните си и в ежедневния си допир до реалността целокупно живеем в истинска трансмедийна вселена” – пише в своите анализи Мая Димитрова „...и продължава движението си в безкрая, окръгляйки се в сферата на безпределно въздействие върху аудиториите в трансмодерността“<sup>3</sup>.

<sup>1</sup> Фелини. Федерико, 1982, с. 104.

<sup>2</sup> Балаж. Бела, 1988, с. 224.

<sup>3</sup> Димитрова, Мая, 2020, с. 77.

Спецификата на анимационния образ е трудноуловима и се проявява в много аспекти. Най-често тя се измерва чрез основни понятия като изображение, движение, пространство и време. Но независимо от общите принципи на изграждане, самото изображение се променя всеки път от характерния стил, визуализираната мисъл и усет за преместване и модифициране във време-пространството на различните автори. За да се достигне до най-новите технологични перспективи, които възвръщат актуалността на класическия покадрово заснет образ.

Поредицата статични рисунки или фази от движението на обекти онагледяват по един особен начин основните закони за движение във физиката (в пряк или деформиран вид). Трите основни принципа на механиката определят инерцията, силата и противодействието на движещите се обекти. Но те не определят времето, за което трябва да се извърши действието. То е условно и изцяло определящо се от художника, който решава за какъв времеви отрязък героят трябва да пресече улицата, да вдигне крака си, да полети... По този начин и пътуването или бягството в анимационното кино често е нереално и някак мистично събитие. Художникът се съобразява единствено с това какво иска да постигне, каква скорост на движение иска да придаде на персонажа, иска ли да наподобява реалните време-пространствени съотношения или не.

Освен пространствената си определеност, екранната анимационна композиция притежава и времева продължителност. "Нематериалността" на линията и цвета в сравнение с движещите се реални обекти от заснетата чрез камерата в натурното кино действителност, както и динамиката на пофазното разделяне на процеса на движение, позволява в рамките на един кадър да се осъществяват сблъсъци и конфликти, раждащи нови образи и идеи. Това, което в игралното кино по принцип се реализира чрез монтажната последователност на отделни откъси заснета действителност, в анимацията е напълно осъществимо в действителната пластична екранна композиция. "...това обстоятелство още веднъж подчертава особено широките граници за отразяване и пресъздаване на света непосредствено чрез пластично динамичната анимационна композиция, включвайки монтажното мислене като съществена особеност на нейната изразност."<sup>4</sup>

---

<sup>4</sup> Герчева. Красимира. 1979, с.37

При анимационния филм в рамките на кадъра се извършва пространственото "живеене" на героите. Развитието и движението на едно тяло в реалността се осъществява в определено време на определено място. Художникът не е зависим така, както кинематографистът в натурното кино от обектива, ракурса на камерата и равномерната скорост на движението на лентата в апарата. Само понякога се съобразява с техния ефект. Анимационното движение може да варира от точност и вярност към натурата до пълната абстракция и абсурд. И в същото време може да се прояви в свое ново качество – в синтезиране на метафоричен образ, създаден от собствена система от знаци и символи. И всъщност, самото бягство или завръщане се превръща в метафорично изключване от дадена действителност и включването в друга, различна, невинаги реално съществуваща. Мястото и времето за "живеене" и „пътуване“ на персонажа се изграждат единствено въз основа на богатството на авторското въображение.

Художественото време в анимацията също не съществува предварително. То не се опира върху запечатано от реално-времева обективна снимка, а се ражда в момента на прожекцията. Художникът създава филма без да го "види" в този период, защото времето и движението съществуват само във въображението му.

Художественото време в анимацията често губи еднопосочността си, става обратимо. При нужда героите не остаряват, не умират, или могат доста бързо да се подмладят без помощта на пластичен хирург. Последователността, пространствените и причинно-следствени връзки се нарушават. Това не е вече време – вектор. Дори мащабът на анимационното време е "условен". А природните сили, които въздействат и на които се подчиняват движещите се в реалността обекти, тук визуално се материализират в една или друга степен.

Айзенщайн нарича плазматичност способността на анимационното изображение да се откаже от "завинаги закрепената форма". Тя се характеризира в движението на превъплъщения. Способността за движение се изгражда, когато определената форма, изображение, персонаж, "подобно на протоплазмата"<sup>5</sup>, се откъсва от закрепената стабилност и движението има способността за развитие, за действителен прескок във времето, за превъплъщението при взаимодействие от форма във форма. Този вид покадрово движение също по някакъв

---

<sup>5</sup> Айзенщайн. Сергей, 1973, с. 298.

начин осъществява избягването, откъсване от дадена реалност или ирационалност, придвижване често без посока, осъществяване на по-емоционало и визуално превъплъщение от образ в образ.

Английският философ-материалист Франсис Бейкън разкрива движението като естествено свойство на материята.

Години по-късно в статията си за творческата еволюция Анри Бергсон разглежда движението в два аспекта: като прост, неделим акт (когато е почувствано отвътре) и като преход от една до друга точка (възприето отвън).

Ако отново разгледаме вече споменатия филм на Валтер Рутман „Берлин, симфония на един град“: „В него не виждаме образи на форми със собствен живот и резки очертания, а само импресии от форми: образи на образи.“<sup>6</sup>, анализира Бела Балаж, давайки пример за движение, подобо на визуализация на музиката. И всъщност, именно в това се състои цялата магия на киното като изобразяване на движението или придвижването. „Неуловими, размити, контурите се преливат помежду си и така конкретността на образната форма се изпарява. Трамваи и джазови оркестри, цистерни с мляко и женски крака, улични тълпи и машини – всичко това прелива вихрено като в полусън, като родени от подсъзнателното видения.“<sup>7</sup>

Ще спра вниманието си на анимационен филм, в който придвижването от място до място е чисто пътешественическо, от една страна, наблюдават се различните природни феномени, богатствата на културата и различните етноси, и именно този сблъсък на различно възприемане превръща филма донякъде в бягство от реалността в един непознат свят, в потъване в богатството на компилация на дух и материя на ново равнище.

Филмът е „Мадагаскар, Дневник на пътуванията“ („Madagascar, Carnet de Voyage“, реж. Бастиен Дюбоа, 2010). Филмът е изграден изцяло в стила на скечбук дневниците (sketch-book journey book), разказващ за пътуването и сблъсъка на един европейски пътешественик с непознатите земи на Мадагаскар. Страниците на дневника се разлистват реалистично, цветните моливни скици оживяват, разказвайки за красотата и историите на вековни традиции и обичаи на Фамадихана. Всъщност, самият разказ е инспириран от реалното пътуване на младия, 21 годишен тогава Бастиен, пътуващ на автостоп от Лил, северна Франция до Истанбул през Италия и

<sup>6</sup> Балаж. Бела, 1988, с. 210.

<sup>7</sup> Пак там.

Гърция. По време на пътуването си режисьорът ежедневно скицира с молив или акварел интересни гледки, места, хора. Първоначалната му идея е да направи книга – пътеводител на пътуването си. Връщайки се в родната Франция, Бастиен започва да учи 3D анимация и тогава първоначалната му идея се променя – дневникът на пътуването вече ще е не отпечатан като албум, а анимиран и раздвижен. Следва по-интересното пътуване и десетмесечен престой на Бастиен в Мадагаскар, привлечен от историята за Фамадихана (церемония на танцуващите скелети). И цялото това допълнително пътуване и сблъсък с почти нереални местни традиции и обичаи надграждат анимационния дневник и го превръщат по-скоро в едно фантастично измъкване, изключване от реалността. Филмът е изграден от различни анимационни техники – акварел, пастел, маслени бои, графична рисунка, и, разбира се, завършващата 3D анимационна технология. Самият режисьор разказва, че няма определена идея за използването на дадена техника в дадена сцена. „Правех рисунките на случаен принцип... Например, използвах акварел на силна водна основа за изобразяване на оризовите полета или по-сухи техники за сухата и прашна част на традиционния танц. Използвах също така и бродерия и stop-motion анимация с малки колички, с които си играят децата“<sup>8</sup> Всъщност, като едно цяло, пътуването до Мадагаскар е представено като пачуърк, събиращ класически рисувани анимационни техники, стоп моушън, ротоскоп, реални предмети, 3D герои и декори, живеещи и развиващи се във времето и пространството. Според Бастиен едни от най-трудните, но и най-запомнящите се моменти от филма са именно началото и финалът му – сякаш наистина пред очите ни се отваря реален дневник на едно пътуване, изпълнен със снимки, рисунки, предмети събрани за спомен, емоции и чувства.

По-късно, през 2012 година Бастиен Дюбоа режисира и телевизионна програма, базирана на филма „Мадагаскар, Дневник на пътуванията“ наречена „Лица от различни места“ („Faces From Places“) с 20 серии по 3 минути, разказващи за пътуване в различни държави по света.

Филмът на Бастиен е идеален пример за анимационно отразяване на едно реално пътуване, разкриващо красотите, трудностите, изненадите и вдъхновенията. Анимираната история се развива в хо-

---

<sup>8</sup> Desowitz, Bill, AWN & VFXWorld. <https://www.awn.com/animationworld/oscars-exploring-madagascar-carnet-de-voyage>, 12. 03.2020

ризонтална права, назависимо от различните пикове, свързани с различни срещи, различни настроения, или отразяване на различни ритуали. Във филма присъства усещането именно за запознаване, разказ от първо лице за пътуването и личната среща с нещо ново и впечатляващо.

Продължавайки темата за пътуването в анимационното кино – между бягството и завръщането, нека спрем вниманието си и на един много по-различен филм, в който пътуването, движението е по-скоро вътрешно бягство в спомените, в опит героят да се върне (а защо не и да изтрие завинаги) в своите спомени зловещи събития – „Валс с Башир“, режисьор Ари Фолман (2008). Анимационно-документалният филм разказва за опита на героя да се върне и да си припомни реалните кошмари преди двадесет години, когато е бил сред войниците, обграждащи палестинския бежански лагер, където за заклани множество хора. Опит за връщане, за пътуване в подсъзнанието, заключило миналото поради чувство за вина и съпричастност. Пътуването назад в зловещото минало на главния герой Ари Фолман е изключително реално и събрано в личната гледна точка на героя – режисьор. Дори интервютата с останалите участници в събитията са записани с реалните гласове на хората. И може би именно анимационната форма на изображение дава на този вид пътуване нужната доза сюрреалистичност, хипнотичност и допълнителна нереалност на реалните документални събития. Технологически филмът е изграден върху компилацията на класическа рисуванa анимация и 3D, което спомага за извеждане на главната цел на наратива – да съсредоточи вниманието на зрителя върху пътуването, връщането назад в подсъзнанието, допълвайки, или изцяло рисувайки загубените и сякаш нарочно задраскани моменти с визуализираните разкази на останалите. Самата динамика на разказа е бавна, допълваща, постоянно движеща се назад или напред в минало и настояще. Пътуването е изпълнено с паузи в разказа, с дупки на отминали моменти, които не искат, или не трябва, да се запълват. С размисли и дълго носено напрежение и тежест.

Филмът разказва за събития, случили се през ливанската война през 1982 година, които Ари, войнишкият приятел на режисьора, му разказва всяка вечер. Разказите са насън, в който героят е гонен от множеството кучета, които той е убил в Ливан, но постепенно сънят разкрива реалността на страшните събития от този период, които той е наблюдавал и дори е участвал в тях. Героят не иска, изтрива и бяга от миналото, и в същото време има нужда да пътува, да се за-



върне към жестоките събития, за да се помири със себе си, за да получи прошка (дори и само от себе си), независимо от участието му главно като присъстващ. Всъщност тук наблюдаваме бягството и завръщането към конкретни събития, които в същото време са събирателен образ на всяка една война, на всяко едно погазване на човешкия живот. Пътуването е назад в човешката душа на обикновения войник, който открива, че всъщност животът на хората е много повече от това да завоюваш дадена територия, да спечелиш дадена битка, да си победител над стотици, хиляди умиращи хора.

Или да изберем друг вид пътуване назад в паметта, бягство от настоящето и завръщане в спомените – пълнометражния филм „Луиз на брега“ (реж. Жан Франсоа Лагони, 2016). За разлика от другия пример, тук драматичните моменти от войанта са заменени с носталгични и мимолетни размисли за отминалия живот. В последния ден от почивката си на море Луиз изпуска последния влак, за да се прибере у дома. Тя решава да остане и да изчака следващото пътуване, въпреки влошаващото се време, смяната на сезоните и самотата. Това е едно пътуване навътре в себе си, едно спокойно осмисляне на изминалото време, на отминалия живот. Самото пътуване е някак по-бавно и съзерцателно, кадрите са дълги и меланхолични, макар че отвсякъде сякаш струи светлина, оптимизъм и едно приемане и наново поглеждане назад на старата жена, но този път преосмислено от различна гледна точка. Свиква с ежедневно оцеляване, сприятелява се с бездомно куче, кръщава го Пепър и преосмисля отминалия си живот. Визуалното решение, наподобяващо класическа живописна рисунка с гваш, чистите пастелни цветове и дългите панорами допринасят за усещането за събиране, за бягство и за завръщане в едно. Самата технология на гваша дава усещането за въздушност, но в същото време и на присъствие на водата, която се смесва с боята, за да създаде изображението. Покадровото движение също е бавно и плавно, понякога състоящо се само от люлеещи се от вятъра треви и папрати, друг път от бурното летене на пясък и дъжд. Движение, подобно на различни етапи и моменти в човешкия живот. Възрастната жена сякаш е спряла за почивка, преосмисляйки всичко минало и предстоящо, събирайки сякаш всички спомени на място, което ѝ е така близко и изпълнено с частици отминал живот. Времето в анимацията е в "условен мащаб". Природните сили, които действат и на които се подчиняват движещите се в реалността обекти, тук в една или друга степен се материализират визуално. Символистичното избиране на брега като

място на екранното действие засилва усещането за очакване нещо или някой да пристигне. Създава се почти физическо усещане за приливите и отливите на емоционално и психологическо ниво, за разбирането на смъртта, уединението и оцеляването. Режисьорът Лагони отбелязва, че „това е филм за живота, но е трудно да го свържете само с една идея.“<sup>9</sup>

Изброявайки различни примери, може да спрем вниманието си и върху едно донякъде по-реалистично „хоризонтално“ пътуване, с филма ми от 2009 година „Пътуване“ (реж. Радостина Нейкова, Владислав Будинов, 2009). Тук пътуването, освен в строга хоризонтална (дори визуално хоризонтална) посока ляво – дясно, се осъществява и дълбоко в човешката душа с „пътуване“ от човек на човек, от същност на същност, от емоция в емоция. Филмът е изграден в анимационната технология фотоизрезка. Наративът проследява движението на влак в една посока и в същото време движението на един човек, търсец близкия за себе си. За да се стигне до финалния момент, когато точно откриващи се, мъжът и жената разбират, че пътуването им продължава в различни посоки. Тук, независимо че присъстват основни елементи на едно традиционно пътуване, и то реални фотоснимки като влак, релси, влаков прозорец, купета, отминаващи стълбове, пътуването се осъществява и дълбоко в душата.

Интересен пример за завръщане, този път за емоционално пътуване назад във времето, за завръщане в детството, е филмът на Наталия Чернишова „Завръщане“ (2013) Филмът е магистърска дипломна работа на режисьорката от „Пудриерата“ във Франция. Тук имаме пътуване назад във времето, пътуване към миналото. Филмът е фино и нежно нарисван с артистична графична рисунка, допълнена на места с цветни акварелни петна. „Винаги се опитвам да направя рисунъка колкото може по-прост. Понякога лаконичният изказ е по-сложен от най-тежката визия.“<sup>10</sup> Казва режисьорката в свое интервю. Млада жена отива на село на гости на баба си. Сяда на дървения стол пред застланата с класическа цветна покривка маса. Още с първата лъжица супа, приготвена от любимата ѝ баба, младата девойка се смаява и се превръща в онова малко, щастливо, безгрижно хлапе, за което баба винаги е била голямата, силната, топлата и вечно очакваща баба, която все ни чака да се завърнем, за да ни прегърне и пренесе в абсолютното безвремие на детството.

<sup>9</sup> <https://cineuropa.org/en/newsdetail/318046/>, 28. 01.2021

<sup>10</sup> **Маринчевска, Надежда. 2013.** <http://newspaper.kultura.bg/bg/article/view/21505>

Тук асоциацията с Алиса, при която се използва анимационното смаляване, за да премине персонажа от едно пространство в друго – по-малко по мащаб, тук е заменено с преминаването от едно време в друго. Героинята на Чернишева се връща емоционално и дори визуално назад в детските си години. Анимационното пътуване е насочено към времето, към завръщане в щастливото и топло отминало време. Художественото време не съществува предварително. То може да се раздува напред и назад в хронографско измерение и не се опира върху запечатаното от реална – времево обективна снимка, а се „ражда“ във въображението на режисьора и, впоследствие, в момента на прожекцията. И всъщност много подходящи за това нежно пътуване в носталгичното минало на детството са думите на режисьорката: „Да, засега не искам да правя черно и сериозно кино. Казват, че ужасиите и мрачното кино се правят от хора, които имат добър живот. Не знам, може тези автори добре да си живеят, а просто филмите им да се фокусират върху „черното“. Не съм привърженик и на безсюжетното кино. Като работя, правя опит да разкажа историята така, че тя да си стои на краката“<sup>11</sup>.

Опитах се да спра вниманието си на няколко различни видове пътуване в анимационното кино, на няколко различни видове бягство, било то реално или дълбоко в подсъзнанието, и завръщане – отново било то достоверно или илюзорно. Всяко пътуване в екранното изкуство е магия, а придвижването в покадровото кино е още по-вълшебно и богато приключение.

Движението тук може да става навсякъде – в хоризонтална посока, във вертикална, напред в бъдещето и назад в миналото, по диагонал и дори с големи прескоци във времето и/или пространството. Движението в покадрово създаденото изкуство може да се осъществи като естествено свойство на материята, като нещо емоционално почувствано отвътре и като чисто физическо придвижване от една до друга точка. Това са съществени схващания и за анимационното кино, при което движението, раздвижването, „одушевяването“ са основополагащи за изграждането на образа, възприемането на екранната реалност или дори на емоционалния отклик от визуално възприетото. А пространството в анимацията е различно от всичко наоколо, различно от това на листа хартия, върху който са нарисувани героите и декорите от филма. То се динамизира чрез движението и звука. Понякога му се дава почти реална дълбочинност на

---

<sup>11</sup> Пак там.

плановете. А понякога авторите предпочитат изискания стил на плоскостността. Пространството в анимацията има способността да се свива и разтяга. Това е характерна особеност в анимацията. То сякаш диша, движи се и "живее" свой собствен живот. А това дава и нов и абсолютно безкраен живот на пътуването, на заминаването и завръщането в покadroво създадените истории.

### Библиография:

**Айзенщайн, Сергей. 1973.** Избрани произведения в три тома. „Неравнодушната природа“, том 3, С. [Ayzenshtayn. S. Izbrani proizvedeniya].

**Арнхайм, Рудолф. 1989.** Киното като изкуство. Студии и статии. С., Наука и изкуство. [Arnhaum. Rudolf. Kinoto като izkustvo].

**Асенин, Сергей. 1974.** Волшебници екрана, М., [Asenin. S. Volshebnyki uekrana]

**Балаж, Бела. 1988.** Избрани произведения, С., [Balazh. B. Izbrani proizvedeniya]

Герчева. Красимира. 1979. Естетика на анимационния филм. С. [Gercheva. K. Estetika na animatsionniya film]

**Димитрова, Мая. 2000.** „Творчески идентификации или косплей на дигиталния екран“ В: „Годишник НАТФИЗ 2019“, С. [Dimitrova, M. „Tvorcheski identifikatsii ili kospiley na digitalniya ekran“]

**Кант, Е. 1991.** Прологомени. § 10, 13, В: История на философията. Антология, част I. съст: Димитър Денков и Иван Колев. С. [Kant. E. Prolegomeni].

**Лекомцева, М. И. 1985.** Някои особености в семиотичната структура на анимацията, В: Проблемы синтеза в художественной культуре. М. [Lekomtseva. M. I. Nyakoi osobenosti v...]

**Маринчевска, Надежда. 2013.** Как може слон да влезе в колибка. Интервю с Наталия Чернишоева, Култура 37 (3008) 08. 11. 2013 [Marinchevska, N. Kak mozhe slon da vlezhe v kolibka] <http://newspaper.kultura.bg/bg/article/view/21505>

**Маринчевска, Надежда. 2001.** Визуалните парадокси на анимационното кино, В: Годишник на Департамента по масови комуникации - НБУ, С. [Marinchevska. N. Vizualnite paradoksi na animatsionnoto kino].

**Маринчевска, Надежда. 2003.** „Анимационно време и анимационно движение“, В: „Сборник теоретични текстове – НАТФИЗ“. С. [Marinchevska. N. Animatsionno vreme i animatsionno dvizhenie].

**Фелини, Федерико. 1982.** Да направиш филм, С. [Fellini. F. Da napravish film]

**Хегел. 1991.** Енциклопедия на философските науки. § 254-256. В: История на философията. Антология по философия част I. съст: Димитър Денков и Иван Колев, С. [Hegel. Entsiklopediya na filosofskite nauki].

**Янакиев, Александър. 1990.** Особености на анимационната изразност. ИИ – БАН (архив). С. [Yanakiyev. A. Osobenosti na animatsionnata izraznost]

**Desowitz, Bill, Awn & VFXWorld.**  
<https://www.awn.com/animationworld/oscars-exploring-madagascar-carnet-de-voyage>  
<https://cineuropa.org/en/newsdetail/318046/>, 28. 01.2021.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.12>*Iris Klosi**University of Tirana, Faculty of Foreign Languages (Albania)*

[iriskokoli78@gmail.com]

## **Social Media Escapism: Exploratory Study of the use of Digital Media by Tirana University Students of English Language**

**Abstract:** *The stress and anxiety resulting from the COVID-19 pandemic has lead to a significant increase in escapist media-based coping. This paper examines the impact of the Covid-19 pandemic on social media escapist activities by the students at the State University of Tirana. In total 52 undergraduate and graduate students aged 20-24 were involved in the study. The students reported 39 digital media involved in their escapist activities, with media sharing networks having a dominant role. From the analysis of their discussion of the motivations and different forms of escapist activities using social media, 5 different but interrelated discourses emerged: (1) Social media have both positive and negative aspects; (2) Social media escapism distorts reality; (3) Social media offer easy and affordable ways to escape; (4) Social media escapism needs to be managed to avoid addiction; and (5) Social media escapism enhances English language skills. The impacts of the Covid-19 pandemic through restrictions on socializing, face-to-face interaction and online teaching were discussed within and across the identified discourses. Increasing their communicative competence in English while interacting with people of different cultural background, including English native speakers was one of most the positive aspects in students' discussions of social media escapism.*

**Key words:** *social media; escapism; English language; Covid-19; discourse analysis.*

### **Introduction**

Digital technology, in its myriad forms and ways, is increasingly shaping our social reality, transforming the cultural, economic and social context and the nature of the interaction between individuals, including the formation of the basic social relationships, such as friendship, love, family, marriage and community.

In a recent study on the impact of lockdown on internet use by 192 adolescents in India, Malaysia, Mexico and the UK, Fernandes et al.

(2020) found an increased use of social media sites and streaming services, compared to the pre-pandemic times, comparing student's habits from before the pandemic. The study results showed that the participants with high scores on gaming addiction, compulsive internet use and social media use also reported high scores of depression, loneliness, escapism, poor sleep quality and anxiety related to the pandemic (Fernandes et al. 2020). Similarly, in their recent research involving students at two American universities during the initial period of the Covid-19 pandemic, Eden et al. (2020) observed an increase in media consumption related to coping with stress and anxiety.

In education, digital technologies help students maximize learning performances and effectively connect with their peers and educators (Wu et al. 2018). Yaros (2012) explored the effects of social media on students' engagement, identity and enjoyment in university courses, regardless of the content to be learned and found that they can significantly influence student's perception and approach of their educational environment (Yaros 2012). Similarly, Zeng et al. (2012) showed that social media can invigorate the learning process by facilitating the interaction between faculty and alumni, on the one hand, and with students on the other. At the same time, digital technologies provide a myriad of opportunities for autonomous language learning beyond the classroom that positively affect language learning gains, contribute to enjoyment of and confidence in language learning (Lai et al. 2017). A more recent study of the role of smartphones and social media for online informal learning of English by Polish and Croatian students, found that informal language learning with digital technologies constitutes an essential context of second language development (Sierocka et al. 2019). They concluded that online informal learning of English for specific purposes provides the students affordable and easy access to authentic materials they are interested, and in ways of their preference, which in turn significantly increases their motivation to learn (Sierocka et al. 2019).

### **Theoretical Framework**

Broadly defined as an escape from reality, escapism has been used by sociologists, psychologists, philosophers and literary critics (Sopčić and Musli 2020). The history of the concept dates back to 1930s when John Crowe Ransom, founder of the Southern New Criticism School of literary criticism, used it to describe a person who seeks diversion from reality (Konzack 2018). Following the history of the use of the term in cultural and literary criticism, he asserts that escapism gained mostly a

negative connotation, but a technical term was never used, based on empirical research, but rather a para-technical expression, a simulacrum, reminiscent of psychotherapeutic pathology (Konzack 2018).

In a similar context, from the late 1940s through 1960s, communication and entertainment research put the concept of escapism in socio-political perspective, linking the growing popularity of radio and television programs to the desire to escape deprived and alienated living conditions (Halfmann and Reinke 2021). From this perspective, in their widely cited paper that today is considered a “standard” text on escapist media use, Katz and Foulkes considered alienation as the main driver of escapist entertainment use (Katz and Foulkes 1962, cited in Halfmann and Reinke 2021). However, Halfmann and Reinke (2021) argued that at that time the empirical evidence for the social causes of escapist use of media were weak and inconsistent.

During the 1980s the focus of research on escapism in the context of media and entertainment moved from the social setting of individuals toward psychological states. In a paper exploring the individual needs to media use, Kubey argued that “television is an activity likely to be chosen by people wishing to escape from negative feelings and from the demands of reality” and proposed three hypotheses that Henning and Vorderer labelled as: sociological escapism; social-psychological escapism; and individual-psychological escapism (Kubey 1986, as cited in Henning and Vorderer 2001).

The uses-and-gratifications (U&G) approach is another stream of research in communication research and mass communication that has greatly contributed to the frequent use of the term of escapism related to media use (Halfmann and Reinke 2019). The theory was developed from a number of prior communication theories and research concerning traditional media (e.g., newspapers, radio, television) to explain how, why, and with what purpose people use the media to satisfy particular needs (Weiyan 2015). The U&G approach is a psychological communication perspective that focuses on the role of social and psychological elements to explain media effects (Rubin 2002). The U&G theory recently have been applied to new media, such as the Internet and social media (Ruggeiro 2000, Quan-Haase and Young 2010, Weiyan 2015, Dolan et al. 2015). Weiyan (2015) provides an overview of studies conducted in the period 1995 – 2010 that applied the U&G theory to various new media and the respective motivations they have identified. More recently, Dolan et al. (2015) applied the uses-and-gratifications theory to examine the

influence of four types of social media content (information, entertainment, remunerative, and relational) on engagement behaviours.

Although the studies applying the uses-and-gratifications approach refer to escapism extensively, they fail to define it in conceptual terms and identify the drives to seek an escape, as well as how media provide an escape (Halfmann and Reinke 2019). For instance, Katz, Gurevitch and Haas proposed five uses and gratifications categories related to five groups of human needs: (1) Cognitive needs; (2) Affective needs; (3) Personal integrative needs/Personal identity; (4) Social integrative needs; and (5) Escapism/Tension free needs; the last category is related to “needs related to escape or tension-release which we define in terms of the weakening of contact with self and one's social roles” (Katz et al. 1973, Choi et al. 2014, Tanta et al. 2014). Another example is Blumler (1979) who proposed three hypotheses about media effects based on these uses: “(a) cognitive motivation will facilitate information gain, (b) diversion or escape motivation will facilitate audience perceptions of the accuracy of social portrayals in entertainment media, and (c) personal identity motivation will promote reinforcement effects” (Blumler 1979, cited in Rubin 2002). According to Halfmann and Reinke (2019), while these studies show that the concept of escapism has clearly shaped communication research and mass communication research, the questions of *when* and *how* people choose media to escape are still lacking clear answers.

While the negative view on escapism prevailed in early communication and entertainment studies, more recent research also acknowledges its positive effects, contributing to a more balanced picture and less normatively loaded concept of escapism (Halfmann and Reinke 2019). Writing from a humanist perspective, University of Wisconsin professor and award-winning geographer Yi-Fu Tuan argued that escapism is an inescapable ingredient of human thought and culture - humans have always sought to escape in one way or another (Tuan 1998). Tuan recognizes that suspicion of escapism has many causes, and that its negative meaning is often related to the notion of “an inability to face facts—the real world” (1998). Being an animal, Tuan argued, a human is congenitally indisposed to accept reality as it is, and like all animals, humans must submit and adapt to reality. Unlike other animals, humans have culture and the capacity to ‘see’ something what is not there, which enables them to transform the reality in accordance with a plan (1998). Tuan contends that “seeing what is not there lies at the foundation of all human culture” and that “culture is more closely linked to the human tendency not to face



facts, our ability to escape by one means or another, than we are accustomed to believe” (1998). Around the same time, sharing with Tuan the humanistic geography approach and philosophy, Sack (1997) integrates the concept of escapism into his relational concept of place. For Sack culture is a morally ambivalent necessity that both helps and hinders. While providing humans with all social relations and meanings to cope with the world and protection from the harsh cold facts, it also provides them with “a means of escaping reality” (1997).

Tuan’s approach to escapism as a survival mechanism typical of humans was shared by the psychologist Andrew Evans who a few years later observes: “as escapism appears to be a natural mechanism, the mind must have need for it” (Evans 2001, cited in Zeuge 2020). Evans identifies four major types of escapist activities: (1) *Evasive* - engaging in an activity to avoid another (“day-life”) activity; (2) *Passive* - engaging in activities that require no input from us; (3) *Active pursuits* - engaging in activities that require actual input from the escapist; and (4) *Extreme* - activities that give negative connotation to escapism, such as binge eating, manic house cleaning, excessive gambling, drug use, etc. (Evans 2001, cited in Warmerlink et al. 2009).

Another stream in psychological research defines escapism as an emotional distress coping mechanism that involves repressing acknowledgement of the causes of the stressful situation (Folkman & Lazarus 1985). Similarly, Heatherton and Baumeister (1991) propose the Escape Theory to explain binge episodes as part of a motivated attempt to escape from self-awareness through cognitive narrowing. In the same vein, Stenseng et al. (2012) proposes a two-dimensional model of escapism that distinguishes between self-expansion (promotion focus) and self-suppression (prevention focus) in the escapist activity engagement.

Recognizing that there have been multiple and conflicting interpretations of escapism Warmelink et al (2014) apply Derridean deconstruction of the use of escapism in playing computer games and propose a theoretical framework that combines the conceptualization of different motivations for escapism with different forms of escapist activities. For the latter they adopt the four types of escapist activities proposed by Evans. The authors define four types of motivations: (1) “Mundane breaking - Escapism can be characterized as a “break” from daily activities”; and (2) Stress relieving When in pain, stressed, or frustrated about something, people like to vent”; (3) Pleasure seeking: “humans are pleasure-seeking creatures and “society may have developed in this manner because people were able to fulfil their basic needs”; and (4) Imagination

conjuring: “people like to daydream and imagine other worlds” (Warmelink et al. 2014). By linking these four types of motivations with the four types of escapist activities, they have developed a matrix of 14 possible escapist configurations, as shown in Table 1 below.

**Table 1.**

	<b><u>How:</u></b> <b><u>Why:</u></b>	<b>Evasive</b> Avoiding form	<b>Passive</b> Non-participative form	<b>Active pursuits</b> Participative form	<b>Extreme</b> Problematic
<b>Cause-based escapism</b>	<b>Mundane breaking</b> Negating the boring	<b>Delay</b>	<b>Take a break</b>	<b>Unwind</b>	<b>Procrastination</b>
	<b>Stress relief</b> Negating a negative	<b>Distance</b>	<b>Relax</b>	<b>Feel better</b>	<b>Denial</b>
<b>Effect-based escapism</b>	<b>Pleasure seeking</b> Attracting a positive		<b>Be entertained</b>	<b>Have fun</b>	<b>Addiction</b>
	<b>Imagination conjuring</b> Visualizing		<b>Fantasy</b>	<b>Immerse</b>	<b>Psychosis</b>

By applying their theoretical framework in an empirical study, Warmelink et al. (2014) identified eight different discourses of escapism in the context of playing multiplayer computer games. These discourses were applied in varying degrees and combinations and indicated that escapism is interpreted quite differently by the participants. Warmelink et al. (2014) conclude that “that attempts at an overall redefinition of the concept are pointless” as well as that “any kind of generalization about the meaning and applicability of escapism in computer gaming is therefore impossible.” Furthermore, considering these limitations, they suggested that their deconstruction of escapism offers opportunities for researchers to employ the concept of escapism in certain cases (Warmelink et al. 2014).

### **Method and procedure**

For this study I adopted the theoretical framework and approach used by Warmelink et al. (2014) to explore how the Covid-19 pandemic impacts social media escapist activities by the students at the State University of Tirana, Albania, Faculty of Foreign Languages, in the context

of informal learning of English as a second language. The idea to conduct the research emerged from the discussions concerning the impact of social media on our lives during my translation course. In these discussions, the students repeatedly mentioned the impact social media have on their lives in general, and during the Covid-19 pandemic in particular. They commented on their motivations and activities on social media networks, platforms and applications, and the advantages and disadvantages of using social media. Another insight topic concerned the use of English language and its improvement and enrichment through the use of social media.

The study was conducted in January and February 2021, involving in total 52 students (49 female, 3 male), aged 20-24, organized in six focus groups (classes). Three groups were composed of 5, 15 and 14 undergraduate students, respectively, and three additional groups included 5, 6 and 7 graduate students, respectively. These students are the future linguists, teachers, translators, or public speakers, and they study English language at its full manifestation and use of English cultural and linguistic practices.

The study was conducted in two steps. In the first step, I assigned the students an essay concerning the impact of social media on their lives. Then I shared a survey (table) that was based on the theoretical framework of escapism developed by Warmelink et al. (2014) and invited them to fill it out by listing their escapist social media activities in general and in particular those which involve the use of English language, choosing the most appropriate escapist activity category, as well as mentioning the social media associated with those activities. An explanatory note guided them through the steps to populate the table, including a non-exclusive list of social media to be considered, grouped in 10 types, following the classification proposed by Foreman (2017).

After giving the assignment, we exchanged chats either in private or as a group through the Microsoft Teams Platform, to deal with their questions when completing the table. The explaining and exchanging information took place within a week and at the end 35 students submitted a populated table via email.

In the second step, 52 students participated in one of the 6 group discussions online in Microsoft Teams Platform that is currently being used for online classes during the pandemic. Each discussion commenced with my introductory comments on the concept of escapism and the types of escapist activities as well as the underlying motives. This was followed by students presenting their results either via sharing their screen

or reading them aloud. Subsequently I moderated a free discussion concerning the reasons and motivations why they escape by using social media.

All discussions were recorded and subsequently transcribed and coded to identify topics and the associated meanings, metaphors, and statements. By combining the categories and interpreting students' responses that seemed to fit each category I identified the major discourses on social media escapism.

### Results and Discussion

Following the surveys, the students reported 39 media they are using in escapist activities, of which 20 were included in the typology of social media, as proposed by Foreman (see Table 2 below). YouTube and Instagram were associated with all fourteen escapist configurations, as defined by Warmelink et al. (2014), and accounted for 28% and 22% of reported examples, respectively. Media sharing networks accounted for 65% of all reported examples of escapist activities and had a dominant role in all of the four types of escapist activities with social media coming second (see Figure 1 below).

**Table 2. Typology of social and other digital media used by the students**

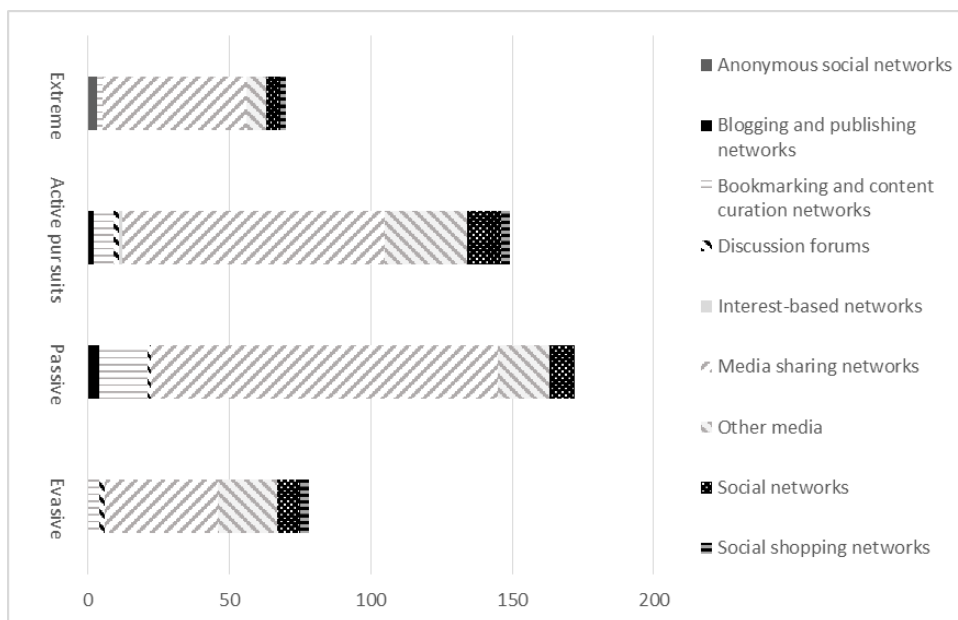
Media Types	Media Included
Social networks	Facebook, Twitter, LinkedIn
Media sharing networks	Instagram, Snapchat, YouTube, TikTok**
Discussion forums	Reddit, Quora
Bookmarking and content curation networks	Pinterest
Blogging and publishing networks	WordPress, Tumblr, We heart it***
Social shopping networks	Polyvore, Etsy, Fancy
Interest-based networks	Goodreads
Anonymous social networks	Whisper, After School
Other media*	WhatsApp, Netflix, Spotify, Viber, Skype, Messenger, Google+, Duolingo, Fitness Viva, Bolt, Canva, VSCO, Busuu, Filma24, Amazon, Disney+, Webton, Gaming, InShot, video games

\* digital media mentioned by the participants, but not included in

<https://blog.hootsuite.com/types-of-social-media/>

\*\* - TikTok was not included in the original list, but is similar to Instagram

\*\*\* We Heart It was not included in the original list, but is similar to Tumblr



**Figure 1. Use of digital media in the four types escapist activities**

By combining the central concepts and positions included in one or more of students' talks, I identified 5 major discourses. Two or more of the identified discourses, even contradictory ones, can be linked to a single student's talk. The discourses presented below are those that dominated the group discussions, with the associated central topics, concepts and positions captured in the most relevant excerpts from students' talks.

#### 1. *Social media have both positive and negative aspects*

Many of the students expressed their ambivalent experience and attitudes concerning social media, mentioning both the positive and negative effects of their use: "... *there are more negative aspects than positive*", "*we don't like our situation, but I think that nowadays it's difficult to stay without social media*". While recognizing the negative effects, they note that social media have been embedded in their daily routines on every scale and have become background of many people's lives, as can be seen from the following excerpts:

*"... is a reality within a reality... we don't know if we are escaping from the reality or from the social media... most of the people nowadays live in Instagram or Facebook, ... it is their routine"*

*“Nowadays social media is a necessity, but we shouldn’t be obsessed with them, we should focus more on other things, by reading a book, meeting a friend or our relatives.”*

The excerpts above suggest that in a society that increasingly depends on social media or digital technology in general, one cannot ignore the novel modes of socializing. In our society media facilitate social acceptance, integration with peers or self-identity construction, which in turn may advance students’ self-esteem and psychological well-being, as argued below:

*“At the end of the day people use social media as a way to fit in people and society. ... when you think like you fit in, you feel you are doing something right, let’s say you are not a boomer or anything like that, so that’s how I see it, peer pressure, because as long as others are doing it why shouldn’t I?”*

*“We find it difficult to overcome escapism, but even social media has a big important impact on our lives ...”*

Interaction through social media with peers, friends and kin has become even more important during the Covid-19 pandemic:

*“We are now staying home and for me it is very important to stay in touch with my friends and relatives who live far away and social networks are really useful to communicate in order not to feel lonely.”*

## *2. Social media escapism distorts reality*

The ambivalent attitudes towards social media in general or as a way to escape is also seen as a tension between its potential to augment or even enhance personal life, on the one hand, and to distort or even replace real experience. Students have argued that social media have a great influence on the content and extent of our awareness of the world and subsequently our self-awareness of being in the world, helping evaluate oneself as part of that world, as can be exemplified in the following excerpts:

*“... in Instagram, for example, we see every day perfect faces or people who are successful and this ... confronts us with the reality and sometimes even with our failures...”*

While social media escapism helps develop different perspectives and expand both our self-awareness and our awareness of the world, many students warned that it is important to see through the details and understand how it distorts and constrains reality:

*“We should try to create the real life and not to be so much influenced by the perfection or by other people’s success or the way they live.”*

*“... social media is not a reality, it’s just a virtual world. It’s a fake world we see here [online]... Sometimes we feel better here [online] but we don’t understand that it’s just a kind of temporary moment ....”*

*“I have to say that I have to make that balance, healthy balance between social media and the reality.”*

Some of the speakers explained how social media can distort reality by avoiding face-to-face interactions when socially challenged while at the same time creating a feeling of social involvement.

3. *Social media offer easy and affordable ways to escape*

*“In my opinion I’ll put an equal sign between escapism and social media... I can’t imagine to escape reality without social media and the reason of using social media without escapism.”*

One of the most recurring themes among the speakers was the accessibility, usability and immediacy inherent to social media. Social media offer a quick and accessible path to addressing our pressing needs, desires, concerns, passions, motivations, and preferences. The following examples are exemplary of the importance attached to social media in addressing the psychological, social and communicative needs of the moment:

*“... social media is like fast-food, ... because anything in social media is quick, you wanna know something, it’s there in 3 seconds, you want to learn something it’s there in 5 seconds, you want to get that dopamine and serotonin rush it’s there in 5 seconds as well.”*

*“Social media is so vast and it’s so majorly used because it’s so easy to access like you can’t always go for a walk, you can’t always go to the gym or do a painting or something, or go to karaoke and sing but social media is in your pocket like 24/7.”*

As in the previous two discourses, these aspects of social media use are reinforced by the Covid-19 pandemic:

*“... due to the fact we are living in a pandemic it’s a little bit difficult for us to live outside of the online world, ... we cannot even go to work at the moment or move out of the house, ... then of course, the online is the one we are escaping or travelling to.”*

*“... in these times of the pandemic we want somehow change the routine, ... and being on social media has become a routine itself but since it has so much to offer we find ourselves being involved in this activity.”*

Students often argued that the dynamic urban lifestyles of today, living in areas full of noise, pollution, dust and the hustle, overcrowded

streets, put more pressure on people to connect with nature, which has been more difficult to achieve during the pandemic:

*“Escapism is a good thing if we could escape to the nature it would have been much better, but the pandemic is preventing us.”*

While recognizing the potential negative effects on their well-being and of alternative ways to cope with the pressure under the pandemic, many of the speakers find it difficult to resist the temptation of using the social media:

*“people choose social media instead of those healthier and simpler activities because it’s so easy to access and it’s so quick, whereas with a book you have to put efforts, ... but we don’t always have this healthy lifestyle, so that’s why we opt for the quick resolutions ...”*

#### 4. Social media escapism needs to be managed to avoid addiction

Following the surveys submitted by the students, addiction was the most frequent category of “extreme” form of escapism (13 out of 22 reported cases), as defined by Warmelink et al. (2014). In the group discussions, students often referred to the risk of losing control over their activities on social media and the associated negative effects on many aspects of their lives, including personal, school, social, and family relationship, especially when they were younger:

*I’ve been very open about mine [addiction]... I may sound a bit superficial while saying this but I was really craving the attention”*

*“... even people my age, ... most of us I think are victims of these bad habits or dangerous habits because it can make you forget about the real life, the real responsibilities”.*

*“For our age we can control what we want to see but it can be harmful to younger ages.”*

Social media addiction, as reported by the students, is often related to escape-objectives, such as entertainment, pleasure seeking, social interaction or procrastination:

*“we just use it as an escape way to seek some pleasure but in the end if we are not careful it can be addictive and dangerous and people don’t realize that.”*

*“it is very easy to get addicted to it, since it releases the serotonin hormone and dopamine just like any drug would”.*

*“I am addicted to WhatsApp because I do talk a lot to my friends. I can say I stay all day.”*

*“I delay doing my homework and postpone doing that. It’s just this procrastination that makes us pursue this social media.”*



Based on personal experience, the speakers highlighted the need of self-awareness and self-control to avoid or minimize the risks of social media addiction:

*“So there should be a greater self-awareness regarding this matter, regarding escapism, addiction and social media.”*

*“So, I think the solution is taking the bull by the horn in order to deal with the problem decisively, but if you just keep running away from it eventually it will come back again and again.”*

##### 5. Social media escapism enriches English language skills

As mentioned above, one of the goals of this study was to investigate the linkages between social media escapist activities and the use of English language. English was reported in all 14 categories of social media escapist activities in surveys submitted by the students.

In the group discussions, the speakers indicated that most of the social media content is in English:

*“I think the language of social media is English”.*

Students make wise use of their preferred social media channels to interact and have their English checked by native speakers. Instagram connects them with international friends where they can speak freely in English:

*“... I am all about the standards in a language and also restrictions, but ... if you go for example to the US and talking all standards and not informal then you will find it difficult to blend in or mix with other natives there, ....”*

*“I used to speak to international friends via Instagram in English with people that were from different places of the world and English connected us”.*

Students used forums and blogs, such as Quora, Reddit, Good-Reads, to read or interact with different international interest groups in English. Despite most of the social media content is available in English language, people can learn a lot about other languages and cultures:

*“I’m addicted to You Tube, I’ve been addicted to it since I was a child, where I’ve learnt my English, 90% of what I know in English there, and not only English, I’ve learnt Italian and Spanish there, too”.*

They can also learn a lot about different cultural backgrounds, tourist destinations, traditions, cooking recipes, universities abroad:

*“I find it helpful not only to enrich my English vocabulary but also to learn how to cook or learn about every-day life in general... We also learn cultural things, places, experiences that we don’t mention much in the classes”.*

## Conclusions

In the group discussions, the students argued that young people, especially university students, have been particularly affected by the restrictions on socializing and face-to-face interaction and online teaching. This topic was embedded in all 5 major discourses that I identified.

Their ambivalent relationship with social media was a particularly salient topic in the discussions. In this discourse, while enabling novel modes of socializing, society's increasing dependence on social media and digital technology in general has many negative aspects. This ambivalence is most prominent with respect to the potential of social media to both expand self-awareness and distort reality.

Another frequently recurring theme in student's discussions concerned the capacity of the social media to satisfy their needs, desires, concerns, passions, motivations, and preferences with ease and speed. In this discourse, social media trump both the risks of uncontrolled social media escapism, and often even the more established or 'healthy' ways of escaping, such as walking in nature or reading a book.

The need of self-control in social media escapist activities to avoid addiction was another distinctive discourse. Addiction was the most frequent category of 'extreme' form of escapism reported by the students. Social media addiction was related to escapism through entertainment, pleasure seeking, social interaction or procrastination.

With most of the social media content being in English, the associated escapist activities involved exposure to and use of English. Increasing their communicative competence in English while interacting with people of different cultural background, including English native speakers, was one of most the positive connotations in students' discussions of social media escapism.

The results of this study show that social media escapism is of high relevance and interest to university students of English language, provoking fruitful debates and sometimes emotional responses. While the results of this exploratory study are preliminary and not representative, the identified discourses offer valuable insights in the potentials and risks of student's social media escapist activities and in the informal use of English language in their online practices.

## Acknowledgments:

I would like to thank all undergraduate and graduate students at State University of Tirana, Faculty of Foreign Languages, who partici-

pated in the survey and especially those who contributed actively to the focus group discussions.

### **Bibliography:**

**Blumler, J. G. 1979.** The role of theory in uses and gratifications studies. *Communication Research*, 6: 9–36.

**Choi, E., Kitzie, V., and Shah, C. 2014.** Investigating motivations and expectations of asking a question in social Q&A. *First Monday*, 19(3).

**Dolan, R., Conduit, J., Fahy, J. and Goodman, S. 2016.** Social media engagement behavior: a uses and gratifications perspective. *Journal of Strategic Marketing*, 24(3/4): 261-277.

**Eden, A. L., Johnson, B. K., Reinecke, L., and Grady, S.M. 2020.** Media for coping during Covid-19 social distancing: stress, anxiety, and psychological well-being. *Frontiers in Psychology*, 11. doi: 10.3389/fpsyg.2020.577639.

**Evans, A. 2001.** *This virtual life. Escapism and simulation in our media world.* London: Fusion Press.

**Fernandes, B., Biswas, U. N., Tan-Mansukhani, R., Vallejo, A. and Essau, C. A. 2020.** The impact of COVID-19 lockdown on internet use and escapism in adolescents. *Revista de Psicología Clínica con Niños y Adolescentes*, 7(3): 59-65.

**Folkman, S., and Lazarus, R. S. 1985.** If it changes it must be a process: study of emotion and coping during three stages of a college examination. *Journal of Personality and Social Psychology*, 48: 150-170.

**Foreman, C. 2017.** 10 Types of Social Media and How Each Can Benefit Your Business. Available at: < <https://blog.hootsuite.com/types-of-social-media> > [Accessed 15 January 2021].

**Halfmann, A. and Reinecke, L. 2021.** Binge-watching as case of escapist entertainment use. In: *The Oxford handbook of entertainment theory*, eds. P. Vorderer and C. Klimmt, 181–203. Oxford: Oxford University Press.

**Heatherton, T. F. and Baumeister, R. F. 1991.** Binge eating as escape from self-awareness. *Psychological Bulletin*, 110: 86-108.

**Henning, B. and Vorderer, P. 2001.** Psychological escapism: predicting the amount of television viewing by need for cognition. *Journal of Communication*, 51(1): 100–120.

**Katz, E. and Foulkes, D. 1962.** On the use of mass media as escape: clarification of a concept. *Public Opinion Quarterly*, 26:377-88.

**Katz, E., Gurevitch, M., and Haas, H. 1973.** On the use of the mass media for important things. *American Sociological Review*, 38: 164-181.

**Konzack, L. 2018.** Escapism. In: *The Routledge companion to imaginary worlds*, ed. M.J. P. Wolf, 246-255. New York: Routledge.

**Kubey, R. W. 1986.** Television use in everyday life: coping with unstructured time. *Journal of Communication*, 36(3): 108–121.

**Lai, C., Hu, X., and Lyu, B. 2017.** Understanding the nature of learners' out-of-class language learning experience with technology. *Computer Assisted Language Learning*, 31(1–2): 114–143.

**Quan-Haase, A. and Young, A. 2010.** Uses and gratifications of social media: a comparison of Facebook and instant messaging. *Bulletin of Science, Technology & Society*, 30(5): 350 -361.

**Rubin, A. M. 2002.** The uses-and-gratifications perspective of media effects. In: *Media effects: Advances in theory and research*, eds. J. Bryant and D. Zillmann, 525–548. New Jersey: Lawrence Erlbaum Associates.

**Ruggiero, T. E. 2000.** Uses and gratifications theory in the 21st century. *Mass Communication & Society*, 3: 3-37.

**Sack, R. D. 1997.** *Homo geographicus: a framework for action, awareness, and moral concern*. Baltimore: Johns Hopkins University Press.

**Sierocka, H., Jurković, V., and Varga, M. 2019.** The role of smartphones for online language use in the context of Polish and Croatian students of different disciplines. *Studies in Logic, Grammar and Rhetoric*, 58 (71): 173-193.

**Sopčič, B. and Musil, B. 2020.** Escapism: suppression of self or its expansion? *Studia Historica Slovenica*, 20(1): 279-301.

**Stenseng, F., Rise, J., and Kraft, P. 2012.** Activity engagement as escape from self: the role of self-suppression and self-expansion. *Leisure Sciences*, 34(1): 19–38.

**Tanta, I., Mihovilovic, M., and Sablic, Z. 2014.** Uses and gratification theory – why adolescents use facebook? *Medijska istraživanja*, 20(2): 85–111.

**Tuan, Y.-F. 1998.** *Escapism*. Baltimore: Johns Hopkins University Press.

**Wu, T.-T., Huang, Y.-M., Shadiev, R., Lin, L., and Istenič Starčič, A. 2018.** Preface. In: *Innovative technologies and learning. First international conference, ICITL 2018 Portoroz, Slovenia, August 27–30, 2018. Proceedings*, eds. T.-T. Wu, Y.-M. Huang, R. Shadiev, L. Lin, and A. Istenič Starčič. Cham: Springer.

**Warmelink, H.J.G., Harteveld, C., and Mayer, I.S. 2009.** Press enter or escape to play. Deconstructing escapism in multiplayer gaming. In: *DiGRA '09 - Proceedings of the 2009 DiGRA International Conference: Breaking New Ground: Innovation in Games, Play, Practice and Theory (Vol. 5)*. DiGRA. <http://www.digra.org/wp-content/uploads/digital-library/09287.04129.pdf>.

**Weiyang, L. 2015.** A historical overview of uses and gratifications theory. *Cross Cultural Communications*, 2(9): 71-78.

**Yaros, R. 2012.** Social media in education: effects of personalization and interactivity on engagement and collaboration. In: *Social media: usage and impact*, eds. A-D. H. S. Noor and J. A. Hendricks, 57-74. Lanham, Md: Lexington Books.

**Zeng, L., Hall, H., and Pitts, M. J. 2012.** Cultivating a community of learners: the potential challenges of social media in higher education. In: *Social media: usage and impact*, eds. A-D. H. S. Noor and J. A. Hendricks, 111-126. Lanham, Md: Lexington Books.

**Zeuge, A. 2020.** The sweet escape - a research agenda on escapism in information systems research. In: *New perspectives on digitalization: local issues and global impact*, eds. J. Radtke, M. Klesel, and B. Niehaves, 93-98. Siegen: Universitätsbibliothek Siegen.

*Maxim Latu*  
*Pyatigorsk State University (Russia)*  
[Laatuu@yandex.ru]

## **Mass Self-Isolation and the Imaginary World of the Future: Visions and Time Spans Reflected in Memes**

**Abstract:** *The sudden outbreak of COVID-19 pandemic as well as the restrictions and measures that were taken to fight it had a great effect on the society. Thus, a lot of memes were created the authors of which frequently related their visions and ideas about mass self-isolation to a particular time span within and after this period. This paper focuses on such polycode texts and considers the ideas and visions that are expressed in them. As the results of the research demonstrate, the image of the world during and after the mass self-isolation period depicted in memes is often opposed to the familiar reality people were accustomed to. The very first days, weeks and months of social isolation, the post-mass-self-isolation months that followed, years of the near and distant future were put into context. The authors mentioned the changes that they thought occurred or would occur in relation to the behavior, habits, appearance and psychological state of a person, social interaction, etc., expressing concerns, mentioning problems and joking about them. Some of these visions were not far from the truth, while others were far from reality. Due to the exaggeration and hyperbolization of these ideas and metaphorical and figurative perception of the observed phenomena, an image of alternative conceivable reality and imaginary world was constructed, parts of which might be distorted or merely fictional. From the early days of mass self-isolation and after it, vaccines were considered to be a means of getting the world back to normal.*

**Key words:** *meme; demotivator; polycode text; mass self-isolation; text component; visual component; time span; perception.*

### **1. Introduction**

The sudden outbreak of COVID-19 pandemic as well as the restrictions and measures that were taken to fight it had a great effect on the society (John 2020; McCormick 2020). People started to spend more time on the Internet and had to fulfill their needs in communication in the virtual reality of social networks. As the lockdown was imposed, they started to joke and imagine what life looked and would look like during and after that period. Its term varied in different countries. The mass

lockdown in Russia took place in April and May of 2020 and was referred to as mass self-isolation regime. During that period of time a large number of Internet memes and demotivators were created since current events, urgent issues and pressing problems as well as their perception are often reflected in the content of such polycode texts (Guskova 2016). As their visual and verbal components are closely interrelated (Wiggins & Bowers 2014), they may supplement each other (Davison, 2012; Szpila 2017). Moreover, the images help to convey the idea expressed in the text part more comprehensively (Golovanova & Chasovskiy 2015). By interpreting a certain phenomenon or a situation, an author of a meme constructs them in its content (Babina 2017). As people were expressing their ideas about the changes caused by mass self-isolation, they paid special attention to the duration of the period. Thus, there are some memes and demotivators where certain time spans are mentioned together with the visions of the ironically represented reality during and after the mass self-isolation period that are associated with them. This research focuses on such polycode texts and considers the ideas and visions that are expressed in them.

The analyzed memes and demotivators share some common features. Thus, their text part contains a certain mentioned time span (day or week number, definite month, season, year, etc.) and/or lexemes that mean “after”, “end”, “over”, that are often accompanied by “self-isolation”, “isolation”, and “quarantine”. Sometimes two or more time spans are mentioned to contrast them and/or show the development of the situation as time goes by. The text part may also convey the ideas and visions associated with the represented time span. The visual part may illustrate and compliment this information or fully express the author’s visions if they are not represented in the text part, as well as reflect the emotional reaction to them. Before discussing the visions of the world after mass self-isolation, it is important to analyze the ideas associated with that period to understand the issues they stem from.

## **2. The first days of mass self-isolation**

### **Day 1**

According to the results of the analysis, people didn’t tend to create memes devoted to the first day of mass self-isolation only. It is interesting that the ideas of what the first day was like are mentioned in memes only in relation with facts that the authors thought might occur on one of the following first 10 days. Thus, the first day is always mentioned in opposition to another day to stress the differences. The authors indicated

that on the very first day a person was likely to make unrealistic plans (as it appears from the context) to do sports, read a lot, and improve health state during the period of mass self-isolation. People were usually depicted neatly dressed, calm, ordinary that implied that all the changes would occur a bit later.

## Day 2

According to the authors' visions, the plans to improve the health state were unlikely to happen and right on the second day people started to eat a lot (junk food in particular) and lie on the bed instead (Pic. 1, 2). Similarly, it was also stated that spouses would very quickly become irritated with one another, even though initially it seemed to them that they would spend a wonderful week together (Pic. 3).

Pic. 1



Pic. 2



Pic. 3



*Picture 1* "Day 1 of quarantine: I am going to take advantage of it to improve my health state. Day 2 of quarantine:";

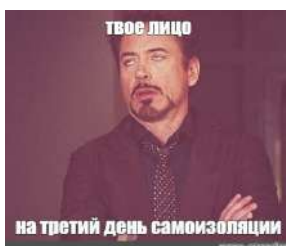
*Picture 2* "Self-isolation. Day 2";

*Picture 3* (top) "we'll have a marvelous week together" (bottom) "Day 2. I am sick and tired of your loud breathing";

## Day 3

Some authors stated that on the third day people would start to grow tired of self-isolation (Pic. 4) and of being together with their children to the extent that a mother of four kids would quickly develop a vaccine on her own (Pic. 5). However, at the same time it was stated that in some families spouses finally had a chance to know each other better and each other's advantages as they had time to talk (Pic. 6).

Pic. 4



Pic. 5



Pic. 6

Третий день карантина.  
Случайно  
разговорились  
с мужем.  
Очень даже ничего  
мужик оказался.

**Picture 4** “Your face on the 3<sup>rd</sup> day of self-isolation”;

**Picture 5** “A mother of 4 kids developed a COVID-19 vaccine on the 3<sup>rd</sup> day of quarantine”;

**Picture 6** “Day 3 of quarantine. I had a conversation with my husband by chance. He turned out to be a very interesting man”;

### Day 4

According to the expressed idea, on the fourth day the changes in the appearance started to manifest. A person had put up weight, his hair and beard had grown long (Pic. 7). A man is depicted sitting relaxed and wondering what to do: have more beer or go to sleep.

### Day 5

The fifth day was associated with boredom. It was depicted that as a person had nothing to do, he constructed a race car out of toilet paper rolls and pasta packages that he had in abundance (Pic. 8). Cats became unhappy with their owners being constantly at home as the latter rivaled them in the desire to lie on the couch (Pic. 9).

Pic. 7



Pic. 8



Pic. 9



**Picture 7** (top) “Day 1 of quarantine: since this day, I will focus on self-development, read a couple of books and go in for sports”, (bottom) “Day 4 of quarantine: shall I have another beer or go to sleep?”;

**Picture 8** “Day 5 of quarantine”;

**Picture 9** “I’ve been lying on the couch for five days; my cat has already started to think that I am his rival”;

### Day 6

The situation remained the same on the sixth day. A person had nothing to do and could not go out anywhere, so feeding toy-ducks



seemed to be a good idea (Pic. 10). Disputes over the territory with pets arose (Pic. 11).

Pic. 10



Pic. 11

Шел 6 день карантина.  
Начались первые конфликты!



Ну и наглость!  
Бедный котик...

*Picture 10* “Day 6 of isolation”;

*Picture 11* (top) “Day 6 of quarantine. First conflicts arose”, (bottom) “What a cheek! Poor kitty...”;

## Day 7

After the first week of mass self-isolation it was speculated that people would start facing financial problems (Pic.12). The feeling of fatigue from the restrictions would grow to the extent that one would wish to commit a suicide (Pic. 13). Spending a lot of time lying on the couch would result in imprints on the back (Pic. 14). According to the expressed opinions that’s also the time when people would start experiencing psychological problems (Pic. 15) and feel lack of social contacts and communication (Pic. 16).

Pic. 12



Pic. 13

Шёл 7-ой день моего карантина...  
Что-то захотелось повязать



Pic. 14

Моя спина после 7го дня карантина



Pic. 15



Pic. 16

Шёл 7-ой день моего карантина...  
 Вот, выпиваю с друзьями



Picture 12 “Day 7 of quarantine”;

Picture 13 “Day 7 of my quarantine... I suddenly had a strong desire to knit”;

Picture 14 “My back after day 7 of quarantine”;

Picture 15 (top) “quarantine”, (bottom left) “Day 1”, (bottom right) “Day 7”;

Picture 16 “Day 7 of my quarantine... Here I am, drinking with friends”;

Why are these ideas associated with this or that particular day? Of course, their correlation is arbitrary and relatively random. This is proved by the fact that different authors, who may speak different languages, associated one and the same idea with different days sometimes using one and the same visual component (compare Pic. 7, 17, 18, 19; Pic. 11, 20). The reason behind the fact that the authors of memes associated these ideas with the first days of mass self-isolation is that they wanted to stress that certain phenomena manifested or would start to manifest very quickly. Still it is interesting and remains a mystery why this or that author chose that particular day (for example, day 3 and not day 2 or 4) to express that particular idea.

Pic. 17

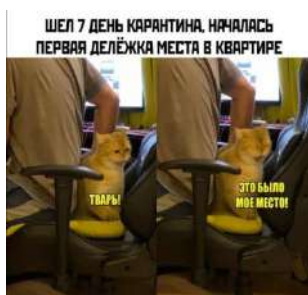


Pic. 18



Pic. 19





Pic. 20

**Picture 17** (top) “Working from home. Day 1”, (bottom) “Working from home. Day 7”;

**Picture 18** (left) “Working from home. Day 1”, (right) “Working from home. Day 10”;

**Picture 20** (top) “Day 7 of quarantine, space sharing out in the flat has started for the first time”, (bottom left) “You, dumbhead!”, (bottom right) “This used to be my place!”;

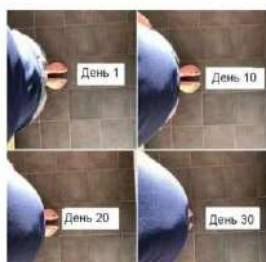
### 3. The following weeks and months of mass self-isolation

As it becomes obvious from the texts, similar issues were associated with the weeks and months that follow. People spent a lot of time lying on the bed and seemed to merge with it (Pic. 21). The authors drew more attention to the changes in appearance and the psychological state (Pic. 21, 23) that, according to the texts, was gradually getting worse. People continued putting on weight (Pic. 24, 25). Having nothing to do, they were bored and tired of staying indoors for a long time (Pic. 26, 27), parents were tired of their kids (Pic. 28) and pets were tired of their owners (Pic. 29).

Pic. 21



Pic. 24



Ну вот и делаем вывод о том, что карантин делает наши ноги все меньше...!

Pic. 22



Pic. 25



Pic. 23



Pic. 26



Pic. 27

Расскажи им, как ты страдаешь на третьей неделе самоизоляции



Pic. 28

Родители после трехнедельного карантина в школах и садиках



Pic. 29

"Почему мой человек три недели не выходит из дома?"



*Picture 21 (top) "Day 9 of quarantine. My bed and I have merged into one whole", (bottom)*

*"part of the crew, part of the ship";*

*Picture 22 "Quarantine. Day 21";*

*Picture 23 (left) "Day 1 of self-isolation", (right) "Day 10 of self-isolation";*

*Picture 24 (from left to right) "Day 1. Day 10. Day 20. Day 30", (bottom)*

*"Well, so we may conclude that quarantine makes our feet smaller and smaller...!";*

*Picture 25 (top left) "March 16", (top right) "April 16", (bottom) "Staying home. Quarantine";*

*Picture 26 "Week 2 of quarantine";*

*Picture 27 "Tell them how much you suffer after three weeks of self-isolation";*

*Picture 28 "Parents after three weeks of quarantine in schools and kindergartens.*

*Picture 29 "Why hasn't my human been outdoors for three weeks?";*

As April was coming to an end, a person, according to the expressed visions, might go wild and crazy after a month of working remotely (Pic. 30), as well as would be tired and annoyed because of isolation (Pic. 34) and continue putting on weight (Pic. 35). Some spouses would become very dissatisfied with each other (31). It was also ironically stated that people would fear to go outside after staying at home for so long (Pic. 32).

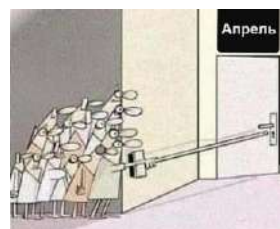
Pic. 30



Pic. 31



Pic. 32





Pic. 33



Pic. 34



Pic. 35



*Picture 30 (left) "Day 1 of self-isolation", (right) "Day 31 of self-isolation";*

*Picture 31 (top) "The end of April" (bottom) "Can you blink a little quieter, you scum?";*

*Picture 32 "April";*

*Picture 33 "When the owners have been at home for 2 months";*

*Picture 34 (from left to right) "1 week of isolation. 2 weeks of isolation. 3 weeks of isolation. A month of isolation. Month 2 of isolation";*

*Picture 35 (from top to bottom) "March. April. May. Quarantine spring";*

As far as May is concerned, similar ideas about pets being tired (presuming that their owners were bored and tired too) (Pic. 33), becoming obese and going out of one's mind were put into context (Pic. 34, 35). As one can see, some visions were repeatedly associated with different time spans of the period of mass self-isolation that creates an impression that the situation remained or developed. More attention was paid to the changes in the psychological state and tiredness as time passed. It is worth noting that the described changes associated with particular days and the time spans that followed correlate with the general ideas about mass self-isolation in memes that were considered in our previous research (Latu 2021).

At that time some also speculated that the period of mass self-isolation would last more than two months that we now know was not the case in Russia. Thus, the visions about inactive lifestyle (Pic. 36) and gain in weight (Pic. 37) were also associated with the third and the fourth months correspondingly.

**Рис. 36**



**Рис. 37**

Шёл 120-ый день самоизоляции

Я:



*Picture 36 "After three months of quarantine. Now call me Mr. Armchair";*

*Picture 37 "Day 120 of self-isolation. Me: come to me, my lovely little plate";*

#### **4. Near future (summer and the following months of 2020)**

Certain visions were expressed about the summer of 2020. It is interesting to note that the authors believed that the period of mass self-isolation would be long-run and would very likely encompass the summer months. This fact is also reflected in jokes about people's intentions. Thus, it was said that people planned to stay at home in June and July, however they were thinking about going to a shop in August (the traditional time of vacation when folks like to travel) (Pic. 38). The potential places to visit during the vacation would all be in virtual reality: Snapchat, Instagram, Twitter, Netflix and YouTube (Pic. 39), consequently the stories in the essays in which pupils describe how they spent the summer holidays would really be made up stories (Pic. 40). It was ironically stated that personal protective equipment would still be necessary and people would move around, swim in the sea and do other activities in protective suits, gloves, etc. that were used in the red zone (Pic. 41). The authors also portrayed an expected image of a high-school graduate in 2020 who stayed at home lying on the couch in his underclothes with a remote control in hand surrounded with boxes with unfinished pizzas (Pic. 42). And again the authors expressed a concern about the likely gain in weight mentioning that one should not buy clothes for the summer then because no one could be sure about the size (Pic. 43). According to the provisions, people wouldn't have lost weight by the summer but might have run out of money (Pic. 44).

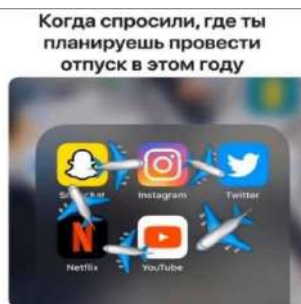
Next November and December of 2020 were in focus. These represent a period of time that is 8-9 months after the regime of mass self-

isolation was imposed. Due to the fact that many couples had a lot of time to spend together at home, some speculated that there would be a year-end baby boom (Pic. 45).

Pic. 38



Pic. 39



Pic. 40



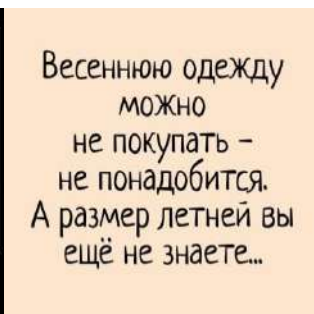
Pic. 41



Pic. 42



Pic. 43



Pic. 44



Pic. 45



**Picture 38** “ – How have you decided to spend this summer? – We're going to stay at home in June and July, but in August we're planning to go to a shop”;

**Picture 39** “When they asked where you were going to spend your vacation”;

**Picture 40** “2020 is a year when the stories in the essays in which pupils are supposed to describe how they spent summer holidays will really be made up stories”;

**Picture 41** “How wonderful this summer will be!”;

**Picture 42** “School graduate, year 2020”;

**Picture 43** “It is not necessary to buy clothes for this spring - you won't need them. And as for the summer, the size of clothes still remains a mystery...”;

**Picture 44** “I doubt whether it is possible to lose weight before this summer comes, but I would like to survive at least”;

**Picture 45** “Just imagine what baby boom will happen in November and December 2020. And all this is because of quarantine and the coronavirus!”;

## 5. Distant future

### A few years later...

As some people tried to peer far into the future, they admitted that mass self-isolation might last for a couple of years. So they ironically expressed the idea that after 2 or 5 years of mass self-isolation people would get accustomed to the new reality and the imposed restrictions (Pic. 46, 47). It was also predicted that as time passed, the baby boom kids would grow up and start to ask questions about that period (Pic. 48).

**Pic. 46**



**Pic. 47**



**Pic. 48**



**Picture 46** “Agafia Lykova, who has been living in taiga for 75 years, asked to notify that self-isolation is hard to endure for the first few years only, then you get used to it”;

**Picture 47** (bottom) “Self-isolation is hard to endure for the first five years only... Then you get used to it. (c) Robinson Crusoe”;

**Picture 48** (top right) “- Mommy, who is my dad?” (bottom left), “- I don't know. He was wearing a face mask”;

### 15 years later

And what would happen 15 years later? According to the expressed opinion, the period of mass self-isolation would be over at that time. This becomes obvious from a dialogue between a son and his dad (Pic. 49). As the kid is trying to solve a mathematical problem, he asks his father why



it is necessary to buy so much toilet paper (167 rolls). As he is recalling the pandemic, the dad tells his son that he will not understand why because he didn't live at that time.

### 65 years later

It was claimed that after many years people would still remember the period of mass self-isolation and recall the events as they talked to their grandchildren trying to explain the desire to be in the open air (Pic. 50). It was also implied that the restrictions would affect the core life values, and people would start to rate the chances to spend time outdoors highly.

Pic. 49



Pic. 50



**Picture 49** (top) “My son \*trying to solve a mathematical problem\*. Daddy, why does Andrew buy 167 toilet paper rolls?” (bottom) “You will not understand...”;

**Picture 50** (top) “2085: – Grandpa, why do you like spending time outside so much?”, (bottom) “– In my time it was illegal”;

## 6. The world after mass self-isolation

Sudden unexpected changes, the atmosphere of uncertainty, conjectures and fears induced some to conjure up images of a post-apocalyptic world after a global catastrophe, nuclear or biological war as they ironically imagined what the reality would be like when the mass self-isolation ended. The military metaphors used in the mass media (“war on COVID-19”, “combat coronavirus”, “win the pandemic fight”, etc.) only contributed to such comic speculations and the appearance of this image. Thus, an analogy was drawn to the scenes in dystopia literature, movies, computer games (Pic. 51) in which the plot implies the possible death of

the considerable part of mankind due to natural or technological disasters, biological threats (COVID-19 is associated with them in this respect), as well as the transformation of the human race into new species as a result of the adaptation to certain changes (like isolation, Pic. 52). Therefore in the visual component of these polycode texts people are often depicted carrying weapons (Pic. 51, 53), wearing gas mask sets (Pic. 73) as they fight alone (being isolated) for their survival.



**Picture 51** (left) “How I look like during quarantine”, (right) “What I’m going to tell my grandchildren”;

**Picture 52** “Year 202.... Self-isolation has ended”;

**Picture 53** “The end of self-isolation”;

What would people be like after the end of mass self-isolation? According to the expressed opinions about this alternative reality, their appearance would change. The most frequent idea is a concern that after having eaten so much food, people would become extremely overweight and obese (Pic. 54, 55, 56), sometimes to the extent that it would be difficult to move around or squeeze oneself through the doorway (Pic. 57). In the visual part of such texts people are depicted fat and are metaphorically compared to heavy-weight animals (Pic. 56). Parallels were drawn to familiar Russian and Disney cartoon characters who at one moment ended up overweight. Thus, these also give a hint about the reasons that stand behind this phenomenon: the excessive food consumption (e.g. Winnie-the-Pooh is famous for his liking for sweet honey) (Pic. 54, 57) and inactive lifestyle (Pic. 58) that were frequently mentioned in memes devoted to the early days of mass self-isolation.

Pic. 54



Pic. 55



Pic. 56

Окончание карантина. Исход из самоизоляции.



Pic. 57



Pic. 58



*Picture 54 "Me after self-isolation";*

*Picture 55 "After quarantine" (advertisement) "Lost puppy";*

*Picture 56 "The end of quarantine. Exodus from self-isolation.";*

*Picture 57 "- Come out! Self-isolation has ended." "- I can't...";*

*Picture 58 (top) "The end of self-isolation", (bottom) "Nutritionists will be the most sought after.";*

The second expected distinctive peculiarity of appearance was that people would appear extremely shaggy, unshorn with unkempt hair due to the fact that hairdressing salons were closed and no one had a chance to go and have a haircut there (Pic. 59). This led to another vision that in the post-self-isolation world there would be long queues for hairdresser services (Pic. 60). Consequently, it was also foreseen that the hairdressers would become extremely prosperous and rich (Pic. 61).

Pic. 59



Pic. 60



Pic. 61



**Picture 59** “I am taking my wife to a beauty salon after quarantine”;

**Picture 60** “How queues outside hairdressing salons will look like after the end of self-isolation.”

**Picture 61** “Quarantine: \*is coming to an end\* Hairdressers:”;

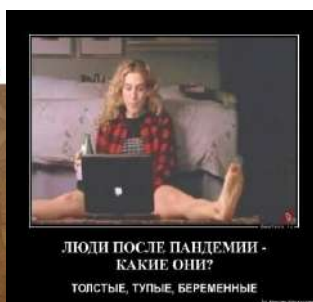
However, it was also assumed that apart from them some other people whose income reduced at the time of mass self-isolation might experience serious financial problems and become poorer (Pic. 62). In compliance with the ideas about the potential baby boom and the online education being inferior to the traditional one, some ironically speculated that people would also be pregnant and less smart (Pic. 63). Some ideas ironically represent a positive outlook on the changes. Thus, it was said that a person would have accumulated adipose tissue that would help him survive in case of food shortage, would take advantage of steel eye muscles that would make it possible to work on the computer for 12 hours and would possess the basic skill to trim own hair (Pic. 64). A medical face mask and a smart watch (not to miss several webinars a day) would be important everyday accessories that would always be kept handy (that is not far from the truth at least in relation to face masks for the moment this text is written as long as the threat of COVID-19 still persists). A frequent work-from-home outfit would include pyjama bottoms, basketball shorts or underwear only (and office clothes from the waist up for online video conferences).

**Pic. 62**

Еда, которую я смогу позволить себе под конец карантина:  
 «Филе воды в собственном соку»



**Pic. 63**



**Pic. 64**



**Picture 62** “Food that I will be able to afford at the end of quarantine: “A fillet of water in its own juice”;

**Picture 63** “People after the pandemic - what are they like? Fat, stupid, pregnant”;

**Picture 64** “A person after quarantine. Accumulated adipose tissue to survive in case of several months of austerity. A basic skill in trimming own hair. Steel eye muscles to work on the computer for 12 hours. New accessories to be trendy. A smart watch not to miss 5 scheduled webinars. A work-from-home outfit”;



As some speculated that the garbage after the mass self-isolation would include a variety of empty alcohol bottles (Pic. 65), others also expressed a concern that there would be a significant rise in divorces (Pic. 66), which stems from the idea about possible family discords during the period of mass self-isolation (however as we know, these speculations didn't come true and remained just assumptions).

Pic. 65



Мусор после самоизоляции

Pic. 66



Карантин закончился... ЗАГСы завалены заявлениями на развод.

*Picture 65* "Garbage after self-isolation";

*Picture 66* "Quarantine has ended... Registry offices are crammed with applications for divorce";

Certain texts suggested that some people would get used to constantly staying indoors and might not want or would fear to leave their homes (Pic. 67, 68) while others expressed a great desire to spend a lot of time outside in the open air (Pic. 69). Meanwhile it was also foreseen that people would be longing for social communication with their friends and would wish to go for a walk whenever possible and for any reason (Pic. 70). Thus, it was admitted that all bars would be overcrowded and people would crave for spending time like they always used to do before the changes that the COVID-19 pandemic brought about (Pic. 71).

Pic. 67



Pic. 68

С 9 июня, все москвичи, которые будут сидеть дома, обязаны заплатить штраф 5000 рублей, за нарушение режима отмены самоизоляции.



Pic. 69

Когда всё это закончится, я выйду из дома и буду просто идти 10 часов

Pic. 70



Pic. 71



*Picture 67* “I suggest we shouldn’t leave home even after quarantine”;

*Picture 68* “Since the 9th of July, all the Muscovites who will stay at home will have to pay a fine of 5000 rubles for the violation of the abolition of self-isolation”

*Picture 69* “When all this ends, I will leave home and just have a 10-hour walk”;

*Picture 70* “When quarantine is over, don’t ask me if I am free. Just say where and when”;

*Picture 71* “In all bars after the end of self-isolation”;

“Will the world be the same again?” was a question flying in the air as the restrictions of COVID new reality were being imposed (Pic. 72). Some authors of memes gave a positive answer ironically remarking that the people who were sane before the quarantine would definitely get their lives back to normal (Pic. 73). As we know after the end of the mass self-isolation period in Russia and the relaxation of COVID restrictions that followed, people gradually started to go back to their old routines and habits, they returned to their workplaces and schools and universities welcomed their students back to in-person learning. It is interesting to note that the key factor in the process of getting back to ordinary social life was considered to be the vaccination. This idea was reflected in memes that appeared after the end of the mass self-isolation period as vaccines were being developed. The vaccine was metaphorically seen as a pill that may help unplug a person from the strange, absurd and seemingly dream reality of the COVID-19 Matrix and take him back to the real world (Pic. 74).

Pic. 72



Pic. 73



Pic. 74



*Picture 72* “Will the world be the same again?”;

*Picture 73* “WHO warns that only those people will get their lives back to normal after quarantine who were sane before it. Idiots will remain idiots.”

*Picture 74* “The registration of COVID-19 vaccine in Russia”

## 7. Conclusion

As the results of the research demonstrate, the image of the world during and after the mass self-isolation period depicted in memes is often opposed to the familiar reality people were accustomed to. The authors of these polycode texts frequently related their visions and ideas about mass self-isolation to a particular time span within and after this period. As the possible length of it was obscure, people kept wondering about its duration. They mentioned the very first days of social isolation, the weeks of the first month, spring months (April and May in particular, when mass self-isolation took place), the post-mass-self-isolation months that followed (particularly summer months in relation to vacation time), some years of the near and distant future as far as 2085. The authors focused on the changes that they thought occurred or would occur in relation to the behavior, habits, appearance and psychological state of a person, social interaction, etc., expressing concerns, mentioning problems and joking about them.

Of course, the link between an expressed idea and a certain day of the first weeks is arbitrary and relatively random. This is proved by the fact that different authors associated one and the same idea with different days sometimes using one and the same visual component. By doing so, they wanted to stress the fact that certain phenomena (such as excessive eating, lying a lot on the couch, becoming bored and tired, etc.) manifested or would manifest very quickly immediately after the beginning of mass self-isolation and as time passed the situation might become worse. It is also worth noting that the ideas associated with particular time spans coincide with the stereotype views on mass self-isolation frequently represented in memes in general.

According to the authors of memes, some of the phenomena and tendencies associated with the period of mass self-isolation would persist after the end of it. Moreover, some of the predictions about the post-self-isolation world (such as possible divorces, the baby boom etc.) are based or stem from them. Ideas about gain in weight and obesity are frequently put in context. Thus, as far as these provisions are concerned, the authors focus on the potential consequences reflected in people’s appearance, behavior and the situation in general, as well as their desires and plans.

Some of these visions were not far from the truth (putting on weight, becoming unshorn, etc.), while others were far from reality (for example, post-apocalyptic scenes). Due to the exaggeration and hyperbolization of these ideas and metaphorical and figurative perception of the observed phenomena, an image of alternative conceivable reality and imaginary world was being constructed, parts of which might be distorted or merely fictional. As some of the represented ideas are based on hyperbole and irony or reflect concerns and fears, the fragments of this conceivable world sometimes appear to be tragic and/or comic. As vaccines were being developed and people started to be vaccinated, more memes devoted to the issue began to appear. From the early days of mass self-isolation and after it, vaccines were considered to be a means of getting the world back to normal.

### **Bibliography:**

- Babina, L.V. (2017).** "Conflict through demotivator: interpretive aspect". *Aktual'n-yye problemy filologii i pedagogicheskoy lingvistiki*, 1, pp. 41-46.
- Davison, P. (2012).** "The language of internet memes". *The Social Media Reader*, pp. 120-134.
- Golovanova, YE.I. & Chasovskiy, N.V. (2015).** "Internet meme as a means of visualization in the mass media". *Vestnik Chelyabinskogo gosudarstvennogo universiteta*, 5 (360), pp. 135-141.
- Guskova, S.V. (2016).** "Creolized text in the Russian mass media (on the example of socio-political publications of the Central Federal District of Russia)". *Voprosy kognitivnoy lingvistiki*, 1, pp. 109-116.
- John, S. (2020).** "The Ethics of Lockdown: Communication, Consequences, and the Separateness of Persons". *Kennedy Institute of Ethics Journal*, 30, pp. 265-289.
- Latu, M. N. (2021).** "Thematic stratification of static polycode texts devoted to self-isolation". *Voprosy kognitivnoy lingvistiki*, 1, pp. 26-38.
- McCormick, L. (2020).** "Marking time in lockdown: heroization and ritualization in the UK during the coronavirus pandemic". *American Journal of Cultural Sociology*, 8, pp. 324-351.
- Szpila, G. (2017).** "Polish paremic demotivators: Tradition in an internet genre". *Journal of American Folklore*, 130, pp. 305-334.
- Wiggins, B. E. & Bowers, B. G. (2014).** "Memes as genre: A structural analysis of the memescape". *New Media & Society*, 5 (11), pp. 1-21.



*Natalija Malets*  
*Uzhhorod National University (Ukraine)*  
[1981phd@gmail.com]

*Oleksandr Malets*  
*Mukachevo State University (Ukraine)*  
[1981phd@gmail.com]

## **Dynamics of Cultural and Educational Processes of National Minorities of Transcarpathia of the Second Half of the 20<sup>th</sup> Century**

**Abstract:** *The article analyses the dynamics of ethnic composition and ethnic processes in Transcarpathia in the second half of the 20<sup>th</sup> century, as well as ethno-cultural processes of national consolidation of Ukrainians of the region as part of the Ukrainian nation. The paper evaluates the practice of the Soviet state and the ideology of the Communist Party of the Soviet Union (CPSU) to determine the nature, content and directions of all ethno-national and ethno-cultural policies in Transcarpathia. While researching the consolidation processes of Transcarpathian Ukrainians as part of the Ukrainian nation, the authors showed that the development of the traditions of Ukrainian national culture was seen in the environment of the creative intelligentsia and the majority of the people as an alternative to ideological communication.*

*It is justified that the main goal of the communist authorities in Transcarpathia in 1945-1991 was to establish socialist, economic, political and ideological regime in the region. In order to accelerate this process, a Russian (Russian-speaking) national minority was hastily created in the region by the state authorities, which, having occupied leading political, ideological and economic positions, became a reliable support for the new communist regime.*

**Key words:** *assimilation; nation; ethnic processes; ethnic groups; national minorities; ethnic consolidation.*

### **Introduction**

#### ***Topicality***

The long period of statelessness of the Ukrainian nation and belonging of its ethnic territories to different state political formations, each dominated by a specific socio-economic, political and cultural regime,

had a significant impact on the preservation and development of the ethnographic zones of the Ukrainian ethnic group. Their formation and development allow specifying the main stages and features of ethnic history, ethnic and ethno-cultural development of the Ukrainian ethnic group, revealing the territorial differences of traditional culture and life.

One of the ethnographic zones of the Ukrainian ethnos is Transcarpathia, which is characterized by considerable ethnic diversity (Ukrainians, Hungarians and Romanians live compactly in certain territories, and Russians, Germans, Slovaks, Jews, Gypsies and others – in small groups in cities and villages) and the ethnographic mosaic of Ukrainians (hutsuls, boykos, lemkos, dolyniany and others).

The features of Transcarpathia are conditioned by the millennial belonging of the region to different states, which has caused considerable political and cultural isolation from the main territories; a peculiar geopolitical location on the border with the ethnic lands of Romanians, Hungarians, Slovaks, Poles and their ethnic formations.

The Ukrainian ethno-consolidating and national liberation movement in this region manifested itself only in the 20<sup>th</sup> century: the decision of the national congress in Khust (January 21, 1919) on the entry of the region into united Ukraine; the mass will of the Ukrainians in Transcarpathia to reunite with Soviet Ukraine in 1944.

With the entry of Transcarpathia into the USSR, the accelerated Sovietization of the region and its integration into the Soviet socio-political system began. At the same time, there was a consolidation of Transcarpathian Ukrainians as part of the Ukrainian nation, assimilation of the best achievements of culture and consolidation of national consciousness.

In the context of independent Ukraine, there is a need to analyse the changes in the ethnic composition of the population of Transcarpathia in the second half of the 20<sup>th</sup> century, to find out the essence of the real policy of the Soviet authorities regarding the ethnicities of this region.

The objective of the study is to analyse the consequences of the national policy of the Union of Soviet Socialist Republics (USSR) for the ethnopolitical and ethnocultural development of Transcarpathia in the second half of the 20<sup>th</sup> century. The research object is ethnic processes in Transcarpathia during the years of communist totalitarianism; national policy of the USSR and its influence on the ethno-political and ethnocultural development of the region in the second half of the 20<sup>th</sup> century.

### **Theoretical background**

*Methods of research* — the principle of historicism, focusing on a specifically historical approach to the study of ethnopolitical and ethnocultural processes, events and facts; structural and system analysis; comparative and statistical methods for processing material of the sources.

An attempt was made to investigate in the summarizing work changes in the ethnic composition of the population of Transcarpathia in the second half of the 20<sup>th</sup> century:

- the size and ethnic composition of the population of the region;
- forms and methods of political and cultural influence of the communist regime on ethnic processes;
- the process of ethnic consolidation of the Transcarpathians as part of the Ukrainian nation;
- influence of internal and external factors on the number of ethnic groups;
- causes of ethnic and cultural isolation of national minorities of the region;
- marginalization and russification of ethnic groups.

In particular, the role of the Communist Party of the Soviet Union and the Soviet authorities in the assimilation processes in Transcarpathia has been clarified; it was emphasized that the displacement of ethnic migrant groups from different parts of the USSR not only brought cultural traditions of another nation, but also increased the ethnic diversity of the population, the Russian national minority was artificially created, which, despite its small size, played a leading political and social role; political and ideological propaganda tools that accelerated political, social and cultural irrigation, assimilation, that is, the assimilation of the indigenous population to the Russian margins, were identified.

The article analyses the state of study of ethnopolitical and ethnocultural processes in Transcarpathia. In researching the topic, unpublished and published sources and the most important researches of domestic scholars were used. In particular, documents and materials of the Transcarpathian Regional and District Committees of the Communist Party of the Soviet Union and the Soviet authorities, which reflect the policy for the region, attitude of local population to multi-ethnic groups, collectivization and fight against the Ukrainian national liberation movement. Various informative reports on the socio-political situation, the scope of the national movement, methods of combating it, repressive

actions and dispossession of the kulaks, deportation of the local population, etc. are analysed.

This work relies on the census materials that reproduce the more or less real demographic, ethnic and socio-cultural situation. These materials confirm the ethno-national consolidation of Transcarpathian Ukrainians as part of the Ukrainian nation, as well as the ethno-national isolation of Transcarpathian Romanians, Germans, Gypsies, Hungarians, as well as the political domination of Russians and the russification of the population of Transcarpathia.

Regional statistical books also contain supporting information. The 1969 statistical books present the demographic characteristics of the population of the cities of Uzhhorod and Mukachevo and all districts. However, the publishers did not provide any information about the ethnic composition of the population, education and culture of the ethnic groups. Unlike the previous ones, in the 1969 book, although a special section "Territory and Population" was singled out, it contained only demographic and superficial ethnic characteristics of the population of the region, and did not contain any data on the social structure of political, cultural life and education of ethnic groups (Itohy vsesoiuznoi perepysy naselenyia 1970 hoda, 1972-1974). In the 1990 statistical book, National Economy of the Transcarpathian Region, according to the census data of 1979 (Naseleattia Zakarpatskoi oblasti za danymy vsesoiuznoho perepysu naseleattia 1989 roku, 1990) and 1989, the ethnonational composition of the population is only one page, there is no information on education and culture of national and ethnic groups of the population of the region (Narodne hospodarstvo Zakarpatskoi oblasti, 1980).

These statistical books do not provide enough material to analyse the ethnic and national situation and ethnic processes in the region during 1944-1991. This has become noticeable today. In an effort to remedy this situation, the organizers of the research and training conference State Regulation of International Relations in Transcarpathia held in Uzhhorod in 1997 included annexes of statistical materials prepared by Matso and Luts in the collection of conference materials (Natsionalnyi sklad naseleattia Zakarpatskoi oblasti (zghidno perepysu 1989 roku), 1997).

A series of documents covering the process of reunification of Transcarpathia with Soviet Ukraine were included in the collection of documents "Following the Path of October" (Shliakhom Zhovtnia, 1973). Important materials for the coverage of ethnic processes in Transcarpathia in the 1940-1980's were published in the popular science edition "The Thorny Road to Unity. For the 350<sup>th</sup> Anniversary of Uzhhorod un-

ion” (Ternysta Doroha do Yednosti. Do 350-richchia Uzhhorodskoi unii, Uzhgorod, 1995), and in the collection of documents and archival materials “The Black Book” (Chorna Knyha, Kyiv, 1998). Much attention is paid to the ethno-cultural processes in the region in the collection of documents and materials of I. Krypiakevych Institute of Ukrainian Studies, which fully consider the main aspects of cultural life and the problem of deportation in Western Ukraine in the late 1930’s - beginning of 1950’s.

Some aspects of the political and cultural development of Ukrainians, Hungarians, Romanians, Germans and Slovaks of the region were covered in scientific papers. This topic was politicized in the Soviet era. This greatly limited the scientific focus of scarce studies, whose nature and content were determined by communist ideological dogmas and the ideological-political interests of the Communist Party of the Soviet Union. Democratization of the socio-political life of the country and its restructuring stimulated the awakening of interest in the chosen topic. This is evidenced by the emergence of a number of journalistic and scientific articles of historical and local lore, focusing only on certain aspects of ethnic and ethno-cultural processes in Transcarpathia. The concept of “ethnic processes” was introduced in the 1920’s by Sh. Marr. Ethnic processes mean all the various ethno-cultural, ethno-social and ethno-political changes in the traits and properties of ethnic communities. Some contemporary researchers interpret ethnic processes as the development of ethnic phenomena, as a consistent change in the stages of ethnogenesis, the combined alternation of ethnic activities in order to achieve the goals and objectives.

Soviet researchers reduced the essence of ethnic processes to ethnic composition. Almost all of them noted that the number of Ukrainians from 1959 to 1989 increased from 74.6% to 78.4%, the number of Romanians during the same time increased from 2% in 1959 to 2.4% in 1989, and the number of Hungarians declined from 15.9% to 12.5%. At the same time, Soviet researchers considered phenomenon of the formation and numerical growth of the Russian-speaking population extremely positive, which in 1989 accounted for 4% of the population of the region and identified itself with ethnic Russians.

The focus of the research was on the dynamics of the ethnic composition of the population of the region, changes in its social structure, unification (Sovietization) of cultural life and linguistic, cultural and ethnic russification, which were proclaimed the main features of “Soviet internationalism”. Official propaganda invoked that representatives of more than thirty nationalities live peacefully and amicably in Soviet

Transcarpathia. However, they were reluctant to say that the multi-ethnic composition of the population of the region and its peaceful coexistence is a long-standing tradition - Transcarpathia did not know real ethnic conflicts in its history. Ponomarov (1986, 175) acknowledged that "the ideological aspects of the Soviet way of life were developed in the process of purposeful activity of the party and the state, in the course of an uncompromising struggle against the bearers of standards, habits, traditions and customs, alien ideology and principles of socialism were imposed". Let us note that these generalizations were denied by the deployment of interethnic conflicts in the late 1980's and the collapse of the USSR in 1991.

Similar assessments and approaches have dominated all ethnographic literature in characterizing ethnopolitical and ethnocultural processes in Ukraine and Transcarpathia in the 1940's-80's.

A nice exception to the ethnographic literature of this content are two articles by Tkachenko (1974a; 1974b), who analyses the dynamics of the ethnic composition of the population of Transcarpathia according to the censuses of 1910, 1930, 1959, 1970.

The authors of "Carpathian Collection" (Karpatskyi Zbirnyk) – Hrozdova (1972), Hratsyanskaia (1972), Filimonova and Shin (1972) – touched upon a number of complex issues of life of the national minorities in Transcarpathia. Nevertheless, even the timid hints at their uncertain ethno-cultural existence have provoked protests by the Transcarpathian regional committee of the Communist Party, which accused the authors of the articles of ideological perversion and anti-Sovietness.

The most notable scientific work of the 1970's was the work of Kopchak and Kopchak (1977), which examined the demographic and social processes in Transcarpathia.

The team of historians of the Uzhhorod State University published essays on the history of Transcarpathia, "By Way of Happiness" (Shliakhom do shchastia 1973), which have become a generalized work on the past and present of Transcarpathia in Soviet historiography. During the perestroika years, the aforementioned team, considering the processes of liberation and reunification of the region in the collection "Transcarpathia: Past and Present" (Zakarpattia: Mynule i Suchasne, 1986), made an attempt to touch upon the problems of ethno-political development. Later the two-volume book "Essays on the History of Transcarpathia" was published (Narysy istorii Zakarpattia. t.2., 1993).

In this period Laver, co-authored with Makara, tried to explain the causes and the course of demographic changes in the structure of the

population of Transcarpathia during 1959-1989 (Laver, 1991; Laver and Makara, 1994).

During the years of independence, the issues of ethno-political and ethno-cultural life of the population are not marked by serious studies. Nowadays, the study of these issues is conducted mainly by Transcarpathian ethnologists, ethno-political scientists, and ethno-demographers. During 1990-1995, Tyvodar devoted a number of scientific and popular scientific materials to this issue. Most of them were included in the collection of scientific papers published in 1995 and collections of papers of research conferences (Tyvodar, 1995a; 1995b; 1995c). The researcher identified the main features of the processes in Transcarpathia in the Soviet era, emphasizing that the entire socio-economic, migration, cultural, religious, linguistic policies of the Soviet authorities were subordinated to the ideological and political interests of the great Russian chauvinists (Tyvodar, 1967; 1993; 1994; 1995).

The totality of the works discussed above does not give a sufficiently complete description of the ethno-political and ethno-cultural processes in Transcarpathia in the 1940's and 1980's. While the overwhelming majority of Soviet-era publications strongly endorsed the Leninist national policy of the Communist Party of the Soviet Union, persistently promoting Russian Soviet culture, internationalism and Soviet patriotism, there is a more critical approach to the coverage of those problems in the publications of the second half of the 1980's. At the same time, the works of contemporary Ukrainian authors unilaterally describe the political and cultural activities of the Soviet totalitarian system (Tyvodar, 1967).

Transcarpathia has long been characterized by significant ethnic diversity. But national and ethnic minorities after the Second World War made up only 21.5-25% of the total population of the region. The incorporation of Transcarpathia into the Soviet state-political system has had different effects on the position, ethno-social and ethno-cultural development of the national minorities. As soon as Soviet troops entered Transcarpathia, they began repressions against the local Hungarians and Germans, who were referred to as hostile nations. In November-December 1944, based on Decision of the Military Council of the 4<sup>th</sup> Ukrainian Front No. 0036, the purge of the Hungarian and German male population of the military age started. They were all equated to prisoners of war and sent to various camps. Those who stayed in the Svalyava camp were forced to rebuild the Volivets-Mukachevo railway. Their working conditions there were so severe that out of 5,430 prisoners of

war about 3,000 were exhausted and were returned sick to the camp in just 1.5 months (Shliakhom Zhovtnia, 1973, p. 162; Makara, 1995, p. 94-96; Pavlenko, 1997, p. 160-161).

In general, significant ethno-demographic shifts have taken place in the Transcarpathian during the years of Soviet rule. Specific materials show that the share of Ukrainians in the structure of the population of the region increased from 67.9% in 1946 to 78.4% in 1989. At the same time, the number of Russians increased from 1.5% to 4%, Romanians – from 2% to 2.4%, Gypsies – from 0.6% to 1%. The share of other national minorities, including Hungarians, Germans, Slovaks and Czechs, Jews, Bulgarians, has been steadily decreasing. In 1946, the Hungarians made up 17.3% of the total population, and in 1989 – only 12.5%. For the same period, the number of Czechs with Slovaks decreased from 1.7% to 0.6%, Germans - from 0.4% to 0.3%, Jews – from 0.8% to 0.2% (Nase-lennia Zakarpatskoi oblasti za danymy vsesoiuznoho perepysu nase-lennia 1989 roku, 1990).

As before, the Hungarians mostly concentrated in the villages of the Zakarpattia (Prytysianska) Lawland. Their highest concentration was in the Berehiv district. According to the 1989 census, 85.1 thousand people lived in the district, of which 57,000 were Hungarians (almost 67% of the district population). (Narodne hospodarstvo Zakarpatskoi oblasti, 1980; Hrachak, 1997).

Almost 28,000 Hungarians lived in the Vynohradiv district in 1989, accounting for only 25% of the district's 113,000 inhabitants. They live both in almost exclusively Hungarian villages (Petrovo, Bobove, Diakogovo, Velyka Palad etc.) and in mixed Ukrainian-Hungarian villages (Chernotysovo, Vilok, Matiievo, Fanchykovo, Tekovo, Chepa, etc.) (Narodne hospodarstvo Zakarpatskoi oblasti, 1980; Hrachak, 1997).

Lack of industrial development and political conditions were the factors that delayed socio-cultural development in Hungarian settlements. Schools, libraries, clubs, hospitals, kindergartens and nurseries were built there mainly with the use of collective and state farms, and only rarely – through state investment (Lyzanets, 1999).

The Hungarian school and the education in their native language were in a particularly difficult condition in the 1960's. Although they formally proclaimed equality of all national groups, in practice there was widespread discrimination against non-Russians. This was especially noticeable in the field of public education (Tyvodar, 1996).

The discrimination of Hungarians in the field of education has been eliminated only in independent Ukraine. This is evidenced by the fact



that there were 95 Hungarian-language schools (1 school for 1621 students) in Transcarpathia in 1998, including 22 secondary schools (17 secondary schools, 4 gymnasiums, 1 lyceum), Hungarian-speaking groups at the Mukachevo Branch of the Ivano-Frankivsk Pedagogical University, at the Uzhhorod School of Culture and Education, the Berehove Medical School, the Berehove Vocational School and the Hungarian Branch of the Uzhhorod State University. In addition, many children of Transcarpathian Hungarians study at higher educational institutions of Ukraine, the Transcarpathian Hungarian Pedagogical Institute in Berehove, as well as secondary and higher educational institutions of Hungary (Lyzanets, 1999, p. 48-49; Hents, 1999, p. 38).

The linguistic Ukrainianization of a small part of the Hungarians was contrary to Soviet party and state policy. It affected only Ukrainian-Hungarian nationally mixed families and some of the 15.6 thousand Hungarians who lived in the Ukrainian ethnic environment (Itohy vse-soiuznoi perepysy naselenyia 1959 hoda, 1963; Itohy vse-soiuznoi perepysy naselenyia 1970 hoda, 1972-1974; Vestnyk statystyky, 1980; Natsionalnyi sklad naselennia Zakarpatskoi oblasti (zghidno perepysu 1989 roku), 1997). One of the drivers of Russification was nationally mixed families who were declared international by communist propaganda. In the pre-Soviet times, ethnically mixed marriages in Transcarpathia were most common in the cities and were very rare in rural areas (Tyvodar, 1967; 1996).

Romanians in Transcarpathia live on the border of Rakhiv and Tiachiv districts. In almost exclusively one-ethnic communities such as Serednie Vodiane, Dobryk, Plaiuts, Bila Tserkva, Dibrova, Hlybokyi Potik, Topchyno, Podishor, Pechera and in the city of Solotvyn. In 1975, 99.2% of Romanians lived in one-ethnic villages. Statistics show the gradual quantitative growth of Romanians within the present Transcarpathia. While there were only 11,867 people in 1921, their number was 12,777 in 1930, in 1959 – 18,346, in 1970 – 23,454, in 1979 – 27,155, and in 1989 – 29,845 people (Statistika prirucka republiky Ceskoslovenske, 1932, p. 9; Administrativni lexiconobci v Republice Ceskoslovenske, 1934, p. 8; Kopchak, V., Kopchak, S., 1977, p. 70; Itohy vse-soiuznoi perepysy naselenyia 1959 hoda, 1963; Itohy vse-soiuznoi perepysy naselenyia 1970 hoda, 1972-1974, Vol. 1-7, p. 175; Narodne hospodarstvo Zakarpatskoi oblasti, 1980, p. 24).

The ideological offensive toward the Romanian population of Transcarpathia has intensified in connection with the adoption of the resolution of the Central Committee of the Communist Party of the Soviet

Union “On Additional Measures in the Field of Ideological Work in Connection with Strengthening of Romanian Nationalist Propaganda Affecting the Interests of the USSR”. In an effort to get out of the difficult situation, ideologists of the Transcarpathian Regional Committee of the Communist Party of the Soviet Union tried to find at least some bases for classifying the Transcarpathian Romanians as Moldavians (State Archives of the Transcarpathian region, p. 20; p. 266; p. 16).

The system of school education in Romanian started in 1919, when Transcarpathia was incorporated into the Czechoslovak Republic. In 1934, the Romanian language was taught in form 1 in 4 elementary schools for 1,772 pupils. All textbooks to the schools were then supplied from Romania. The pupils received incomplete secondary and secondary education in their mother tongue in neighbouring Romanian cities. The Soviet system of Moldovan-language education of the Transcarpathian Romanians started as early as 1945/1946, when the seven-year schools began to work in Solotvyn, Dibrova, Bila Tserkva and Serednii Vodanyi (Ihnat, 1971; Istoryia horodov i sel Ukraynskoï SSR. Zakarpatskaia oblast, 1982, p. 465, 467, 474).

If the elimination of illiteracy and receiving incomplete secondary education in the Moldovan language were more or less successful, obtaining secondary education in the same language was rather problematic. Even in 1979, there was only one secondary school for 27,000 Romanians. Even in the restructuring 1989, there were 10 schools for 29,485 Romanians and only 2 secondary schools (1 secondary school for 14,742 Romanians) (Maryna, 1997, p. 114). This has significantly affected the relatively low level of education of Romanians compared to Russians, Ukrainians, Hungarians, Slovaks (see Table 1).

**Table 1. Educational level of ethnic groups in Transcarpathia (per 1,000 people) as of 1989** (State Archives of the Transcarpathian region, C.153; Tkachenko, 1974)

<i>Ethnic group</i>	<i>higher</i>	<i>incomplete higher</i>	<i>specialized secondary</i>	<i>secondary</i>	<i>incomplete secondary</i>	<i>primary</i>
<i>Ukrainians</i>	68	10	149	367	218	145
<i>Russians</i>	246	25	267	310	-	34
<i>Hungarians</i>	37	7	98	427	264	155
<i>Romanians</i>	17	3	38	208	451	181
<i>Slovaks</i>	88	12	157	385	101	-
<i>Gypsies</i>	-	-	7	97	431	387

The program of ideological work envisaged the expansion of activities of cultural institutions. Village reading rooms, clubs, village and school libraries were established in each Romanian village (State Archives of the Transcarpathian region, p. 275). The situation was similar in the Romanian villages of Tyachiv district. In 1952, there were only 49 readers for 650 yards in the village of Dibrova in the village library, and the Resolution of the Tyachiv District Committee of the Communist Party of the Soviet Union noted that no mass political work was carried out in the village of Hlybokyi Potik. The same situation was recorded by the resolutions and decisions of the District Committees of the Communist Party of the Soviet Union in 1960-1970 (State Archives of the Transcarpathian region, p.153).

The predominantly agrarian development of the villages, their almost complete one-ethnicity and endogamy, and the exclusive one-ethnicity of the Transcarpathian Romanians' marriages contributed to the preservation of their ethnic stability and sustainability. They have preserved ethnic environment, ethnic specifics, language, traditions and folklore, national identity almost unspoiled from the outside (Malets, 1999, p. 134; Narodne gospodarstvo Zakarpatskoj oblasti. Statystychnyi zbirnyk, 1980, p. 15; 29; Tkachenko, 1974, p. 65).

German settlers appeared in the territory of historical Transcarpathia in the 10<sup>th</sup> century. During the Middle Ages, they contributed to the development of many settlements in the region. At the beginning of the 18<sup>th</sup>-early 19<sup>th</sup> centuries, there was a new period of German colonization, which resulted in virtually all non-German settlements of the region. The materials of censuses and other official documents indicate that there were 12,914 Germans in 1910, 10,674 in 1920, 12,713 in 1930, 2,338 in 1946, 3,504 in 1959, 4,230 in 1970, 3,746 in 1979, 3,478 in 1989 in the territory of modern Transcarpathia (State Archives of the Transcarpathian region, St.u.39,40;141; Makara, 1995, pp. 95-96).

The Soviet era was tragic for the Germans of Transcarpathia. As early as 13.12.1944, the Military Council of the 4<sup>th</sup> Ukrainian front issued Decree No. 0036 on sending all German men aged 18 to 55 to the Camps of Prisoners of War. The next day (14.12.1944), the military commandant ordered the rear services to identify, register and take in such Hungarians and Germans for "three-day" restoration work. Only during 13-14.12.1944, the NKVD (People's Commissariat for Internal Affairs) troops detained 292 German men in the Svaliava, Vynohradiy, Khust, Rakhiv and Mukachevo districts. They were sent to the Svaliava and Staryi Sambir camps of prisoners of war (Pavlenko, 1997, p. 161).

The Germans emigrated from Transcarpathia at the end of World War II. Emigrant sentiments have grown especially rapidly since the late 1950's, with the return of a large number of people repressed to their native land. For example, in 1944, the village of Nimetska Mokra was home to 1,075 Germans (Kulia, 1977, p. 138-147; 1995, p. 47-55; 1998, p. 11-12). During the years of Soviet power, all the traditions of the national and cultural life of the Germans of Transcarpathia were destroyed. In 1935/36, there were 26 German schools in the region, with more than 2,157 pupils enrolled in 44 classes, 29 German village reading rooms, 9 drama hobby groups, 17 musical instrument orchestras, etc. (State Archives of the Transcarpathian region, p. 87).

Weakening Soviet Union's pressure on the Germans in the mid-1970's was accompanied by attempts to encourage them to get secondary and higher education, to involve them in membership in the Communist Party of the Soviet Union, to work in public and mass-political organizations, to advance to leading administrative positions. The liberalization in the attitude of the official authorities to the Germans has led to a number of publications on the successes of German workers in the regional and district press. However, it was difficult to stop the emigration sentiment among the Transcarpathian Germans. During 1979-1992, 887 Germans emigrated from Transcarpathia (Kampov, 1993).

Despite the significant improvement of national-cultural life of the Transcarpathian Germans in independent Ukraine, they leave for Federal Republic of Germany. Old inhabitants of German villages state that "... there will probably be no young people here..." soon (Makara and Ofitsynskyi, 1996, p. 17).

The Soviet authorities "closed" the Slovak issue as early as in 1945-1947, when all Slovak schools, public and political organizations, newspapers and magazines were closed, all forms of national-political and religious life were suspended, etc. (Natsionalnyi sklad naseleння Zakarpatskoi oblasti, zghidno perepysu 1989 roku), 1997). For centuries, Slovaks, like Ukrainians, have been nationals of different states, denationalized and assimilated by politically dominant ethnic groups. For a long time, they have been the object of Hungarianization, which has become manifested by widespread of the Hungarian language among the Transcarpathian Slovaks. During the 1920s - 1930's Slovaks, belonging to the Czechoslovak people, were subjected to Czechization, and in the Soviet era, they sought to Russify them by various methods. This was most clearly manifested in the recognition of ethnically foreign languages as the main spoken or native languages (see Table 2). The census data of

1979 and 1989 testified to the emergence of quite significant groups of Ukrainian-speaking and Hungarian-speaking Slovaks (Hapáková, 1997, p. 105; Natsionalnyi sklad naselennia Zakarpatskoi oblasti, zghidno perepysu 1989 roku), 1997; Kulia, 1998, p. 64).

**Table 2. Distribution of Slovaks by mother tongue**

<i>Year of the census</i>	<i>Total number of Slovaks</i>	<i>With Slovak native language</i>	<i>With Ukrainian native language</i>	<i>With Russian native language</i>	<i>With Hungarian native language</i>	<i>With other native languages</i>
<b>1979</b>	8,200	3,468	2,309	316	n/d	2,107
<b>1989</b>	7,329	2,555	2,433	388	1,890	53

The significant spread of the Ukrainian language among Slovaks is connected with a number of objective factors: the similarity of the Ukrainian and Slovak languages, the predominant study of Slovaks in Ukrainian schools, the long peaceful coexistence of Ukrainians and Slovaks, and the lack of conflicts on ethnic, religious and political grounds between them, closeness of cultural and daily life traditions, ceremonial culture and folk art, etc. (Makara and Myhovych, 1997, pp. 66-67).

All these factors influenced the ethnic marginalization of the Transcarpathian Slovaks, their low national consciousness. They were linguistically Ukrainized, Hungarianized or Russified, and only in independent Ukraine their national cultural and political revival began.

According to the 1989 census, 12,131 Gypsies lived in Transcarpathia, and according to a sociological survey of 15.04.1989 - more than 20,000. With the establishment of Soviet power, the situation of the Gypsies, despite the slogan of "socialist internationalism", was no less difficult than in the past. A clear indication of this fact is the Decree of the Supreme Soviet of the USSR of October 5, 1956 "On Engaging Vagabond Gypsies in the Work" and Resolution of the Council of Ministers of the USSR No. 1373 of October 5, 1956 "On Engaging Vagabond Gypsies in the Work". The third clauses of the Decree and the Resolution obliged the repressive authorities to catch the Gypsies and to bring them to criminal responsibility (Navrotska, 1997, p. 116-121; Adam and Navrotskaia, 1997, p. 123-127; Yemets and Diachenko, 1993, p. 7-9).

Although the aforementioned Decree and Resolution declared the need to create jobs and conditions for their livelihoods, they created a legal basis for the persecution of the Gypsies by the authorities. As a result, Gypsies began to conceal their ethnicity, resort to the deception of the authorities and various tricks. All this further contributed to both the

self-isolation of the Gypsies by the non-ethnic population and their ethnic marginalization.

In 1946, 12,176 Russians and Russian-speaking people arrived in Transcarpathia, which made up more than 1.5% of the population of the region. In terms of social composition, more than 83% of Russian-speaking people were administrative, party, NKVD-KGB, court staff and prosecutors. This tendency was particularly noticeable in the first post-war decade, when, in the face of widespread distrust to local Ukrainians, party authorities determined the percentage of replacement of local personnel by those who came from the east, mainly Russians (Narysy istorii Zakarpatskoi oblasnoi partiinoi orhanizatsii, 1980, p. 150; Istoryia horodov i sel Ukraynskoi SSR. Zakarpatskaia oblast, 1982, p. 67; Khymynets, 1996, p. 159). At the same time, the war-torn economy was to be reconstructed, collectivization and industrialization began, requiring some staffing. These positions were mainly held by migrants from the Russian Federation.

In general, the migration of Russians and Russian-speaking people to Transcarpathia during 1945-1991 was under constant state control. Regardless of whether the Russians came to Transcarpathia with job placement, moved to relatives (earlier migrants, wives, brothers, etc.), or settled in the region at will (those became numerous after the adoption on 1.09.1955 of the Resolution of the Central Committee of the Communist Party of the Soviet Union on granting privileges in the choice of place of residence, allocation of housing and employment of demobilized officers), the Russians felt comfortable at all levels. They quickly adapted to local conditions because they had well-established cultural and information support, a system of teaching children in Russian schools, newspapers, radio, cinema, television, etc. (Narody mira: Istoryko-etnohrafycheskyi spravochnyk, 1988, p. 501).

The Table 3 shows that in 1979, 97.3% (and in 1989 – 95.7%) of Russians recognized Russian as their mother tongue. The language barrier did not interfere with them because they believed that all local people had a good understanding of Russian.

**Table 3. Distribution of Russians by mother tongue**

<i>Census year</i>	<i>the total number of Russians</i>	<i>with native Russian</i>	<i>with native Ukrainian</i>	<i>with other native languages</i>
<b>1979</b>	41,713 (100%)	40,611 (97.3%)	985 (2.4%)	117 (0.3%)
<b>1989</b>	49,458 (100%)	47,387 (95.7%)	1,871 (3.7%)	209 (0.5%)

The Russian national minority was practically formed during the years of Soviet rule. In 1946, more than 1.5% (12,176 people) of the Russian-speaking population of the region identified themselves with the Russians, in 1959 the Russian-speaking population was already 3.2% (29,599 people), in 1970 – 3.3% (35,189 people), in 1979 – 3.6% (41,713 people), in 1989 – 4% (49,458 people) of the total population of Transcarpathia. The formation of the Russian-speaking minority in the region is fully linked to the policies of the Communist Party of the Soviet Union and the Soviet authorities, which strengthened their dominance by creating a politically, socially and culturally dominant ethno-social community. Their quantitative growth is entirely related to the constant influx of Russian-speaking migrants and russification processes.

The entire ethno-cultural policy of the Soviet authorities stemmed from the communist socio-political ideology and practice of socialist industrialization, collectivization and cultural revolution. Their implementation broke the traditional division of labour of almost all ethnic groups in Transcarpathia, each being more or less clearly oriented to certain activities. Among the population, they cultivated and promoted extra-national, ideologized picture of the world, a “cultural”, with a peculiar “monopoly” of one Russian language, propagated a functional and production approach to languages, education, life, nature, etc. Romanians, Germans, Gypsies and partly Hungarians, while maintaining their economic, cultural and historical traditions, successfully resisted cultural assimilation. Transcarpathian Ukrainians, massively involved into the realm of socialist economic and political transformations, have undergone significant influences from the socialist Russian-speaking culture. Russian-speaking migrants occupied almost all managerial administrative, state and party positions. In spite of this, the overwhelming majority of Transcarpathian Ukrainians linked their future only to the Ukrainian ethno-national world, preserving most of the ethno-cultural traditions of festive ritual and household culture, attitudes, ideals and stereotypes.

During 1945-1991, the Hungarian national minority experienced a very difficult period of political, ideological and national pressure, and from 1989 – a gradual national and cultural revival. Since the fall of 1944, the local Hungarians were massively repressed until 1953, after that they were released from concentration camps and partially rehabilitated. Along with the Ukrainians, the Hungarians were involved in all the socio-political and national-cultural processes of the Soviet era. Insufficient economic development and political conditions have largely delayed socio-cultural construction in Hungarian settlements. In 1957-1958,

there were 100 Hungarian-language schools operating there (13 secondary, 52 seven-year and 35 primary). This means that there were only 13 secondary schools for 146,247 Hungarians, that is, one secondary school for 11,207 Hungarians (at the same time, there was one secondary school for 2,690 Russians in the region). The situation worsened in the following decades. In 1979, there were only 6 secondary schools for 158,450 Hungarians, that is one secondary school for 26,400 Hungarians. Even in 1989, when the perestroika policy had already become full-scale, there were 50 schools for 155,711 Hungarians in Transcarpathia (11 secondary schools; one secondary school for 14,155 Hungarians).

Maintaining a high level of ethno-national consciousness of the Hungarians of Transcarpathia was facilitated by the fairly wide functioning of almost all cultural and household traditions, both rural and urban; they were difficult to assimilate. In 1989, only 0.6% of them called Russian as their mother tongue and 2% - Ukrainian. Mostly residents of cities called Russian their native language, and Ukrainian - rural residents from mixed Ukrainian-Hungarian villages. At the same time, Hungarians have a very high percentage of single-national marriages, and Russification or Ukrainization were negligible in ethnically mixed families.

In general, the national consciousness of the Hungarians was characterized by the dominance of traditional stereotypes. New "socialist" cultural and historical traditions did not take root, and their construction was superficial and shallow. The main role in maintaining a high level of ethno-national consciousness was played by the preservation of traditional family relations and the intergenerational transfer of ethnic information.

The Romanians underwent all those processes that Ukrainians from the first years of liberation and the establishment of Soviet power in the region. They were not referred to as "hostile nations" and were not repressed, but were gradually involved into the Soviet socio-political system, like the Ukrainians. In late 1944 - early 1945, about 50 Romanians were voluntarily or forcibly enlisted in the ranks of the Soviet army, and over 80 joined the Czechoslovak military corps of General Svoboda. In addition, they were involved in resolving the fate of the region because four delegates of the First Congress of People's Committees from Romanian villages supported the reunification of Transcarpathia with Ukraine. Forced collectivization provoked resistance of the peasants. As the vast majority of Romanians resided in rural areas, over 82% of them were considered to be working in collective farms and 18% - in forestry and industry. The urgent problem was the employment of working-age popu-



lation and the lack of jobs at the place of residence. The vast majority of able-bodied male population did not have a permanent job and regularly went to seasonal jobs outside Transcarpathia and Ukraine.

The predominantly agrarian development of the villages, their almost complete one-ethnicity and the exclusive one-ethnicity of the marriages of the Transcarpathian Romanians helped to preserve their ethnic stability and sustainability. They kept intact their ethnic environment, ethnic specifics, language, traditions and folklore, national consciousness. This is confirmed by the fact that a very small percentage of Romanians recognized the language of another ethnic group as their native language, in particular Ukrainian and Russian. In general, the Transcarpathian Romanians are characterized by a high level of national awareness and strong sense of local patriotism. They almost did not assimilate or relocate abroad and other regions of the Soviet Union. Among the reasons for this was the high level of material sufficiency, and seasonal employment. In 1979, there was only one secondary school for 27,000 Romanians. Even in the reconstructing 1989, there were 10 schools for 29,485 Romanians, of which only two were secondary schools (one secondary school for 14,742 Romanians). This caused a low level of education of Romanians compared to Russians, Ukrainians, Hungarians, Slovaks.

The Soviet era's repressive policy against the Germans was accompanied by widespread anti-fascist, essentially anti-German, propaganda on radio, in press, films, literature, school and university education. The Germans felt everywhere like an outcast belonging to a hostile nation; some of them registered as Ukrainians, Slovaks, even Hungarians in their passports. In 1945-1950, the number of nationally mixed marriages in German families increased.

In general, the German national minority of Transcarpathia existed in the conditions of political repression, as well as national and cultural persecution during 1945-1991. The attempt of some Germans to escape persecution by changing their nationality, marrying Russians or Ukrainians did not save them from mistrust. It was a purposeful anti-German policy and practice that became the main factor for their emigration to their historical homeland. This was facilitated not so much by economic difficulties, as by the lack of prospect of their ethno-national existence in the face of a significant reduction in their numbers.

During the 20<sup>th</sup> century, the political, legal and national-cultural situation of the Transcarpathian Slovaks has changed several times. In the newly formed Czechoslovakia, Slovaks belonged to a politically, na-

tionally and culturally dominant population. The situation of Slovaks changed with the occupation of Transcarpathia by Hungary in 1939. The Soviet authorities constantly influenced the situation of the Slovaks through their political measures. For official ideology, propaganda and politics, Czechoslovakism has always been at the forefront, beyond which it was difficult to perceive the national interests of the Slovaks, and especially the interests of the small national minority of the Transcarpathian Slovaks. The Soviet military invasion of Czechoslovakia in 1968 and the subsequent ideological offensive of the Soviet totalitarian system against the manifestations of nationalism finally suppressed any manifestations of the national and cultural life of the Transcarpathian Slovaks, except for primitive ethnography.

The national minority of Russians in Transcarpathia was formed during the years of Soviet power by immigrants who began to settle here on their own or were sent to work by state authorities. The overwhelming majority of Russian white émigrés who lived here during the 1920's – 1930's left the region during the occupation of Transcarpathia by the Hungarian fascists, while others escaped with the approaching Soviet army. In 1945-1946, a small number of those Russophile intellectuals who sought to annex the Transcarpathian region to the USSR within the Russian Soviet Federal Socialist Republic attributed themselves to the Russians.

The Soviet authorities everywhere mistrusted the local population and its personnel. This was one of the factors encouraging the resettlement of the Russian and Russified ethnic groups to Transcarpathia. The purpose of this controlled migration is to form a social base for supporting the Soviet regime. The Russian-speaking settlers were given a special role and place in the plans for accelerated exploitation of the region's natural and labour resources. At the same time, Transcarpathia played a special role as a military stronghold to control all of Central Europe. The events of 1956 in Hungary and 1968 in Czechoslovakia confirmed the role of Transcarpathia as an important Soviet military and political foothold.

### **Conclusions**

Dynamics of ethnic composition and processes of national consolidation of the Ukrainians as part of the Ukrainian nation in the second half of the 20<sup>th</sup> century were determined by the policy and ideology of the USSR. The period from October 1944 to June 1945, despite the uncertainty of Transcarpathia's legal status, is characterized by the gradual

establishment and assertion of power by the Soviet regime. These processes did not cause much concern in most Ukrainians of the region, because they solved the main historical task for them - the reunification of Transcarpathia with Ukraine.

The period from July 1945 to 1950 can be conditionally called the time of Soviet "Ukrainization", which took place against the background of the establishment of Soviet socio-political relations and communist ideology. The socio-political actions of the authorities determined the nature, content and directions of all ethno-social and ethno-cultural processes in Transcarpathia. The specific political measures of the authorities began to create an ethno-social support for the new regime.

Since mid-August 1945, a large number of Russian-speaking demobilized servicemen have been settled and employed in the region. At the same time, a wide program of development of national education and culture was implemented in Transcarpathia, which largely became a major factor in the spread of Ukrainian literary language and the best examples of Ukrainian folk and professional culture.

The inclusion of Transcarpathia in the all-Ukrainian socio-economic, cultural, educational and state-administrative structures exacerbated the Transcarpathian sense of unity and identity with the whole Ukrainian ethnic group. Mobility of the population within the republic increased, general household culture and urbanization raised, accessibility of education, distribution of Ukrainian-language literature, radio, press, which accelerated the process of ethnic consolidation of Transcarpathians within the Ukrainian nation, increased sense of involvement in Ukrainian history and culture, display of new talents.

In the environment of the artistic intelligentsia, the development of the traditions of Ukrainian national culture was seen as an alternative to ideological communization. This showed that the Soviet regime had not yet fully controlled the activities of the Transcarpathian-Ukrainian intelligentsia. In general, during 1945-1953, the Transcarpathian Ukrainians were deeply disappointed in the socio-political practice of the Soviet authorities, became aware of their anti-Ukrainian nature and the malignancy of Soviet totalitarianism, imbued with the ideas of national liberation movements and promoted their national and cultural figures of the national scale from among their environment.

The content and nature of ethnocultural processes in the Transcarpathian pre-Soviet era was characterized by the planning of traditional forms of culture that forced a person to live and act according to custom, to behave in a stereotypical manner, according to ancient standards.

Changes in traditional culture took place very slowly, and the development of Transcarpathian Ukrainians and national minorities took place in the usual socio-cultural and political environments. Each of the ethnic groups of the region was guided by several determining traditions.

Romanians, Germans, Gypsies and partly Hungarians, while maintaining their economic, cultural and historical traditions, successfully resisted cultural assimilation. Transcarpathian Ukrainians, being massively involved in the sphere of socialist economic and political transformations, underwent political influences of the socialist Russian-speaking culture.

### **Bibliography:**

Administrativni lexiconobci v Republice Ceskoslovenske, 1934, Dil. II. Praha.

**Hapáková, M., 1997.** Slováci v obci Turji Remety. Slováci na Zakarpatskej Ukrajině. Bratislava.

Statistika prirucka republiky Ceskoslovenske, 1932. Praha.

**Adam, A.E., Navrotskaia, E. M., 1997.** Tsyhane Zakarpattia v posttotalitarnyi period (po materyalam peryodycheskoi oblastnoi presy). Materialy naukovopraktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 123-129.

Vestnyk statystyky, 1980, 8.

**Hents, A., 1999.** Chitko bachymo nashi spilni interesy. Kalendar ukraintiv Uhorschyny. Uzhhorod, 38-39.

**Hranchak, I.M., 1997.** Uhorts Zakarpattia v pislivoienni roky: kilkisnyi analiz (1945–1996 rr.), Materialy naukovopraktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 83-97.

**Hratsyanskaia, N.N., 1972.** Sovremennye kulturno-bytovye protsessy u slovakov Zakarpattia. Karpatskyi sbornyk. Moskva, 108-115.

**Hrozdova, I.N., 1972.** Etnycheskaia spetsyfyka venhrov Zakarpattia. Karpatskyi sbornyk. Moskva, 95-107.

State Archives of the Transcarpathian region, F.P. 1, Exp. 1, C. 266, Sh. 28.

State Archives of the Transcarpathian region, F.R. 915, Village council of Seredne Vodiane village, Rakhiv district (1946–1971), Exp. 1, C. 20.

State Archives of the Transcarpathian region, F.R. 2539, Village council of Solotvyno urban-type settlement of Tyachiv district (1947–1972), Exp. 1, C. 16.

State Archives of the Transcarpathian region, F.P. 28., Exp. 1, C. 275, Sh. 28.

State Archives of the Transcarpathian region, F.P. 1., Exp. 7, C. 153.

State Archives of the Transcarpathian region, F.R. 195, Executive Committee of the Transcarpathian Regional Council 1946–1980 pp., Exp. 23, St. u. 39, 40.

State Archives of the Transcarpathian region, F.R. 195, Exp. 11, St. u. 141.

State Archives of the Transcarpathian region, F. 1, Exp. 7, C. 87.

Yemets, H.S., Diachenko, B.I., 1993. Tsyhanske naselennia Zakarpattia. Uzhhorod.

Istoryia horodov i sel Ukraynskoi SSR. Zakarpatskaia oblast, 1982. Kyev.

Itoty vsesoiuznoi perepysy naseleniia 1959 hoda, 1963. Moskva.

Itohy vsesoiuznoi perepysy naselenyia 1970 hoda, 1972-1974. Moskva, T. 1-7.

**Ihnat, A.M., 1971.** Zahalnoosvitnia shkola na Zakarpatti v XIX – pochatok XX st. Uzhhorod.

**Kampov, P., 1993.** Nimtsi v Karpatakh. Zakarpatska pravda, 14 serpnia.

**Kopchak, V.P., Kopchak, S.Y., 1977.** Naselenye Zakarpattia za 100 let (1870–1970). Lvov.

**Kulia, F., 1977.** Prosvitnytska diialnist tovarystva nimetskoj kultury u 20–30-ti roky na Zakarpatti. Materialy naukovo-praktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 138-147.

**Kulia, F., 1995.** Nimetski shkoly na Zakarpatti: istoriia i suchasnist. Carpatica–Karpatyka, Vyp. 4: Nimtsi na Zakarpatti (X–XX st.), 47-55. Uzhhorod.

**Kulia, F., 1998.** Nimetski shkoly na Zakarpatti. Uzhhorod.

**Laver, O., 1991.** Khto my, shcho my: Sproba etnodemohrafichnoho doslidzhenia. Karpatskyi krai, 10 veresnia.

**Laver, O.H., Makara, M.P., 1994.** Zminy demohrafichnoi struktury naselennia suchasnoho Zakarpattia. Carpatica – Karpatyka: Aktualni pytannia istorii, istoriohrafii i kultury krain Tsentralnoi i Pivnichno-Skhidnoi Yevropy, Vyp. 2. Uzhhorod.

**Lyzanets, P., 1999.** Stan osvity uhortsiv na Ukraini. Kalendar ukrainsiv Uhorschchyny na 1999 rik. Uzhhorod, 48-51.

**Lyzanets, P., 1999.** Uhortsiv Ukraini. Kalendar ukrainsiv Uhorschchyny na 1999 rik. Uzhhorod, 24-27.

**Makara, M.P., 1995.** Zakarpatska Ukraina: shliakh do vozziednannia, dosvid rozvytku (zhovten 1944 – sichen 1946 rr.). Uzhhorod.

**Makara, M., Ofitsynskyi, R., 1996.** Nimtsi v Zakarpatti (pro knyhu H.V. Pavlenka). Zakarpatska pravda, 3, 1.

**Makara, M., Myhovych, I., 1997.** Karpatomy poridneni. Uzhhorod.

**Malets, O., 1999.** Dynamika etnichnoho skladu naselennia ta etnichni protsesy na Zakarpatti v 1945–1990 rr. Karpatyka, Vyp. VI: Etnichni ta istorychni tradytsii naselelnia Ukrainskykh Karpat kintsia XVIII–XX st. Uzhhorod, 94-120.

**Maryna, V., 1997.** Etnokulturnyi renesans rumynov Zakarpattia. Materialy naukovo-praktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 110–115.

**Navrotska, Ye. M., 1997.** Tsyhany Zakarpattia v posttotalitarnyi period. Materialy naukovo-praktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 116-122.

Narysy istorii Zakarpatskoi oblasnoi partiinoi orhanizatsii, 1980. Uzhhorod.

Narysy istorii Zakarpattia. T.2., 1993. Uzhhorod.

Narodne gospodarstvo Zakarpatskoi oblasti. Statystychnyi zbirnyk, 1980. Uzhhorod.

Narody mira: Istoryko-etnohrafycheskyi spravochnyk, 1988. Moskva.

Naselennia Zakarpatskoi oblasti za danymy vsesoiuznoho perepysu naselennia 1989 roku. Statystychnyi zbirnyk, 1990. Uzhhorod.

Natsionalnyi sklad naselennia Zakarpatskoi oblasti (zghidno perepysu 1989 roku), 1997. Materialy naukovo-praktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod.

**Pavlenko, H. V., 1997.** Nove pro deportatsiiu nimtsiv Zakarpattia v 1944–1946 rr., Materialy naukovo-praktychnoi konferentsii «Derzhavne rehuliuвання mizhetnichnykh vidnosyn y Zakarpatti». Uzhhorod, 160-164.

**Ponomarov, A. P., 1986.** Etnohrafichna nauka u vyvchenni ta propahandiadianskoho sposobu zhyttia. Prohresyvnii narodni tradytsii v zbahachenni radianskoho sposobu zhyttia. Kyiv, 153-170.

Ternysta doroha do yednosti. Do 350-richchia Uzhhorodskoi unii, 1995. Uzhhorod.

**Tyvodar, M., 1993.** Osnovni etapy etnichnoi istorii ukrainskykh Karpat. Materialy naukovo-praktychnoi konferentsii «Ukrainski Karpaty: etnos, istoriia, kultura». Uzhhorod, 471-483.

**Tyvodar, M., 1994.** Politychne pidgruntia psevdoteoretychnykh poshukiv «zakarpatskoho bahatonatsionalnogo narodu». Kultura ukrainskykh Karpat: tradytsii i suchasnist. Uzhhorod, 249-262.

**Tyvodar, M., 1995.** Ideolohichne chaklunstvo nad kulturoiu (shcho distalos nashym ditiam). Zakarpattia: narodoznavchi rozдумы. Uzhhorod, 65-84.

**Tyvodar, M., 1995.** Politychni ta teoretychni aspekty etnichnykh protsesiv na Zakarpatti XX st. Zakarpattia: narodoznavchi rozдумы. Uzhhorod, 107-133.

**Tyvodar, M., 1995.** Tak chy zakhystymo ridnu movu zakonom. Zakarpattia: narodoznavchi rozдумы. Uzhhorod, 62-65.

**Tyvodar, M., 1995.** Fedir Potushniak. Zakarpattia: narodoznavchi rozдумы. Uzhhorod, 41-46.

**Tyvodar, M.P., 1967.** Protsezy zblyzhennia predstavnykiv riznykh natsionalnostei v kolhospnomu seli Zakarpattia. Materialy XXI naukovoii konferentsii Uzhhorodskoho derzhavnogo universytetu. Kyiv, 222-226.

**Tyvodar, M., 1996.** Etnichni protsezy i tradytsii mizhetnichnogo spilkuvannia v umovakh sovietskoho Zakarpattia. Karpatskyi holos, 2-4.

**Tkachenko, L.O., 1974.** Dynamika etnichnogo skladu naseleennia Zakarpattia. Narodna tvorchist ta etnohrafiiia, 1, 65-68.

**Tkachenko, L.O., 1974.** Metodyka doslidzhennia etnichnykh protsesiv (na materialakh Zakarpattia). Narodna tvorchist ta etnohrafiiia, 3, 55-62.

**Filimonova, T.D., Shin, M.F., 1972.** K voprosu ob etno-kulturnom razvytyi nemtsev Zakarpattia. Karpatskyi sbornyk. Moskva, 116-138.

**Khymynets, Yu., 1996.** Ternystyi shliakh do Ukrainy. Uzhhorod.

Chorna knyha Ukrainy. Zbirnyk dokumentiv, arkhivnykh materialiv, lystiv, dopovidei, statei, doslidzen, ese, 1998. Kyiv.

Shliakhom do shchastia. Narisy istorii Zakarpattia, 1973. Uzhhorod.

Shliakhom Zhovtnia. Narisy istorii Zakarpattia, 1973. Uzhhorod.

*Özgenur Çaputlu*  
*Yıldız Technical University (Turkey)*  
[ozgenurcaputlu@gmail.com]

## **A Feminist Analysis: Sexual Violence in the Bosnian War (1992-1995)<sup>1</sup>**

**Abstract:** *Throughout history, war violence has disproportionately affected women, especially in patriarchal societies. Wartime rape, which is the most common and destructive type of conflict-related sexual violence, is the clearest example of these effects. This study clarifies the sexual violence experiences of Yugoslavian women during the Bosnian War, which had lasted between the years 1992-1995, with an anti-militarist feminist perspective. The first part of the article includes hypotheses of feminist theory about conflict-related sexual violence. The second part handles types of sexual violence such as wartime rape, forced prostitution, and forced pregnancy that had affected women in Yugoslavian conflict areas between 1992-1995. The last part of the study describes the numerical dimensions of the sexual violence used in the Bosnian War and its effects on Yugoslavian women.*

**Key words:** *onflict-related sexual violence; anti-militarist feminism; wartime rape; Bosnian War.*

### **1. Introduction**

Bosnian War (1992-1995) is an important example that shows that war violence and violence against women are related to each other and rise simultaneously in wartime (*Kreft, 2018, p. 2*). In this study, sexual violence is handled as a fundamental patriarchal problem and at the same time, clarified as a war policy implemented over women. In this context, the article also aims to explain which social identities are targeted by sexual violence policies and what kind of impact they have on those identities.

The basic assumption that initiates the intellectual preparation of the study derives from the effects of the violence unleashed in the event

---

<sup>1</sup> The subject of this article is the main topic of the author's master thesis and the article has been produced from the thesis.

of war on human societies. According to this assumption, war violence polarizes hostile communities and highlights their distinct identities. To set an example, "Bosniak-Serb" identities that have existed in Yugoslavia for a long time are more adopted by the opposing ethnic groups as the ethnic conflicts in the region come to the fore. Similarly, in religion-based conflict, "Muslim-Christian" identities were polarized and became more prominent. In this case, the polarization created by sexual violence, which is one of the most common forms of war violence, will be in the direction of "male and female". Increasing sexual violence in the event of war and militarization increase gender awareness and turns women into a means of war. This hypothesis constitutes the main thesis of this article.

The acceptance of women as an object during the war is related to the different social identities women have together. In this context, conflict-based sexual violence is a form of violence that targets women with all their ethnic, religious, and cultural identities. Therefore, violence against a particular ethnic, religious and cultural group should not be considered independent of the biological form of that group. The research question of this article should be expressed as follows: In the case of war in patriarchal societies, why is an important part of strategies of ethnic cleansing carried out by the opposing parties through female bodies? In other words, how do sexual violence as the female dimension of war mediate the domination of two hostile communities over each other? Throughout the study, an answer to this basic research question is sought through the examples of sexual violence used in the Bosnian War. This answer also explains how the social roles assigned to women in patriarchal societies turn into a disadvantage in case of war and militarization. Therefore, the hypotheses of this article claims that all kinds of actions that pose a threat to women's identity are produced from the values of the patriarchal society and are repeated and intensified in case of war.

The article also has secondary questions whose answers are sought. What is the impact of sexual violence practices in Bosnia on Yugoslavian women and female identity? How did the experience of the Bosnian War affect the women's social and political mobility in the region? The answers to these secondary questions constitute the conclusion part of the cause-effect relationship.

The theoretical line to be followed throughout the study is the feminist theory, as this article requires looking at war and violence from within women's identity and from women's experiences. Moreover, the Bosnian War case is an example that mostly reflects the arguments of



feminist theory, which is an anti-militarist and critical theory, about the relationship between women and war.

This article aims to explain the nature of sexual violence from an anti-militarist feminist perspective and discuss the experience of sexual violence in the Bosnian War with the help of numerical data from field studies of respected authorities. Besides, the article is a synthesis work that examines the characteristics of women's organizations established during the war in Yugoslavia and tries to establish their relationship with conflict-related sexual violence.

This article is a study that questions why and how a case develops and tries to reach the whole by examining a given area. At the end of the research, certain hypotheses are verified or falsified, data related to the field is interpreted and an examination is made on a specific theory. This article tries to explain the nature of sexual violence and how it comes to life through a given area.

Among the research methods which are offered by the qualitative research method, the orientational research perspective is frequently used in the fields of political economy, political science and international relations. Orientational perspective often goes after this question: How does any X perspective reflect on a particular reality? This article poses a question from a deliberate point of view: How do the hypotheses of anti-militarist feminism on the relationship between women and war realize themselves in the case of the Bosnian War? As a result, the orientational perspective is available for the fabric of this work.

In the study, the researcher is also involved in the data collection process. To ensure the originality of the sources that make up the study, important data of war victims were obtained as a result of communication established with the International University of Sarajevo. Moreover, considering that this will not be enough, a meeting was held with a war victim from the members of the CURE Foundation, which is the largest feminist women's network in Yugoslavia.<sup>2</sup> The document (*Kovačević et al., 2011*) presented by the members of the foundation, conveying the experiences of Yugoslavian women about the Bosnian War, and the information obtained from the activity reports of other women's associations in the region. Besides, the original transcripts of the reports of the commissions established by the United Nations for the investigation of war crimes in Bosnia are included in the bibliography.

---

<sup>2</sup> Meeting with Ajna Jusić, 11<sup>th</sup> February 2020, Sarajevo.

## 2. Feminist View: The Relation Between Women and War

The concept of gender, which is the focus of this study, is one of the basic terms of feminist theory. Gender roles in patriarchal societies are concepts expressing the assignment of various sociological roles to the biological sexes. The common patriarchal view that women are the secondary gender in society has largely shaped the position of women during the war and the forms of women's militarization (*Simons, 1983, p. 559*).

Radical feminist theorists agree on a common assumption about the masculinity of war (*Zalewski, 1995, p. 351*): “Wars have been mostly or entirely male occupation throughout history. In fact, according to some, the testosterone hormone of men is effective in wars.” (*Goldstein, 2001, p. 31*). Supporting this view, *Enloe (2006)* argues that the militarization of individuals and the continuation of the privileged position of masculinity is possible through certain roles assigned to women. Because of this reason, *Enloe’s* work focuses on female soldiers, soldiers’ mothers and wives, military nurses, military prostitutes and women who have been raped by soldiers (*Enloe, 2006, p. 30*). *Cockburn (2010, p. 152)*, associates the phenomenon of war with gender, as *Enloe (2006)* does, and argues that war nurtures the gender roles assigned to men and women. According to *Cockburn (2010, p. 152)*, in the war, the male side integrates with the themes of dignity and honor, the female side with the themes of vulnerability and victimization.

The secondary status attributed to women in the patriarchal social structure is more pronounced in military institutions and militarization processes. Anti-militarist feminist theorists, like *Enloe*, argue that military institutions dominate women by assigning physical and mental roles. The position of women in war in patriarchal cultures justifies anti-militarist feminists. In patriarchal societies, war is experienced as a social situation in which men exhibit all kinds of heroic skills and assume the title of “protective”. In response, in wars, women’s need for protection is reinforced, and the secondary passive gender attribute that supports the fighting man is once again underlined (*Webster et al., 2019, p. 4*). Thus, gender roles in daily life of patriarchal societies are reinforced. *Enloe (2006)* expresses it like this way: “Armies rely on women but not all women’s experience of militarization is the same. The armies need some women to provide commercial sex services to male soldiers, and others, as soldiers’ wives, to devote themselves to marital fidelity in their troops.” (*Enloe, 2006, p. 17*). It is possible to say that the militarization of women can take place in different ways. In this context, women have

different experience of militarization, such as being military prostitutes, washing clothes in the army, or cooking food for soldiers in the army (*Enloe, 2006, p. 93*).

One of the most painful experiences of militarization faced by women in patriarchal societies is conflict-related sexual violence. In fact, sexual violence is not just an experience of militarization, it is also a daily problem in patriarchal cultures (*Sharma, 2017, p. 1038*). According to the values of male-dominated societies, women represent the honor of the family to which they belong. Women who have been subjected to sexual violence in daily life or war, under any circumstances, are judged as immoral. Especially women, who are victims of rape, face rejection by their family (*Kovalovska, 1997, p. 935*). In this case, the first target the enemy will attack to sociologically harm in a patriarchal society is a female body, which represents the honor of the family. In patriarchal societies, a raped woman is not accepted into the family institution due to both moral labels and traumas she has experienced. In this case, the motherhood role of women is prevented and the population growth of the society is reduced (*Gallagher, 2003, p. 91*). According to the thesis of Ruth Seifert (*Seifert, 1994, p. 61*), who works on sexual violence, in patriarchal structures, the military institution is seen as a place, where masculinity is proven. For this reason, male soldiers prefer a sexual way as a sign of their power, and war turns into a social situation where sexual violence is frequently used. When all the futures are considered together, sexual violence is also a war strategy, is an effective way of bringing down a society both demographically, ethnically, and socially.

### **3. Types of Sexual Violence in Bosnian War (1992-1995)**

Bosnian War, which had lasted between 1992-1995, is a war in which ethnic cleansing practices and, accordingly, sexual violence acts were carried out intensively. In this war, sexual violence was carried out by military and semi-military units in conflict zones in Yugoslavia as an active part of the ethnic cleansing policy. In this context, conflict-related sexual violence against civilian women was implemented as a method of psychological and sociological damage in the Bosnian War, as a war policy in the full sense of the word (*Diken and Laustsen, 2005, p. 112*).

Sexual violence in the occupied areas was perpetrated by military units with support from the Yugoslav Federal Army and with direct links to the Serbian state. It is possible to examine uniformed military offenders (*Banac, 1997, p. 113*) in four groups: members of the official Yugoslavian army, paramilitary squads of volunteers loyal to the army, crews

of Serbian origin which has helped to store weapons, and law enforcement agencies of the Bosnian Republika Srpska. Conflict-related sexual violence, in particular rape, has been recognized as a ritual of wearing military uniforms and a recruitment ceremony (*Basic, 2015, p. 7*).

### 3.1. Systematic Rape in Bosnia

It is possible to increase the types of war rape expand the subject through different examples. However, the case of rape in the Bosnian War is compatible with four types of rape in *Enloe's (2006)* typology: “the rape of women of different ethnic groups or races by a group of occupying soldiers in order to force them to flee from the area where they live, rape of captive women by soldiers of a congregation or nation to humiliate the men of the opposing group... the rape of women who took refuge in refugee camps during the war, by men who took refuge there, or by men responsible for protecting the women in that camp and, the latest, rape of women by men who has organized prostitution and preparing them for service in the brothels arranged for military customers.” (*Enloe, 2006, p. 202-204*).

It is also possible to classify the rape cases in Bosnia according to the place where they took place and related to the purpose of the rape. For instance, the first type of this case is rape which had happened in-home or the street where women live. The rape of women in their own homes is practiced as a tactic of intimidation and subjugation so that the victims move away from the area with feelings of shame and trauma (*Işıközlü and Millard, 2010, p. 13*). In conservative Muslim societies, especially in rural areas of Bosnia and Herzegovina, a rape victim is a symbol of immorality and dirtiness (*Gutman, 1994, p. 10*).

One of the interesting points is that girls, especially between the ages of 7-14, were selected as victims of rape. Another report on this subject lowers the age limit to 6 and states that girls were raped in front of their parents and brothers (*Kovalovska, 1997, p. 934*). The United Nations General Assembly approved this in a report published on the systematic rape in Bosnia and registered the fact that children are also victims of sexual violence in Bosnia and describing it as a “disgrace” (*UNGA, 1994, p. 3*).

The second type of rape during the Bosnian War is the systematic rape in concentration camps (*Işıközlü and Millard, 2010, p. 31*). The International Criminal Tribunal for the Former Yugoslavia, which had investigated war crimes in Bosnia and Herzegovina, has founded in its trial that Bosnian women were brought to concentration camps by Serbian

soldiers, imprisoned there, and repeatedly raped by soldiers (*Crowe, 2015, p. 3*). According to the statistics provided by the State Commission of Bosnia and Herzegovina, approximately 25.000 women of all ages, mostly Muslim women, were brought to concentration camps established in conflict zones, and according to recorded data, women were systematically raped in most of the 200-odd concentration camps (*CEDAW, 1994, p. 1*). The concentration camps in Brčko, Doboj, Foča, Goražde, Kalinovik, and Višegrad have known as some rape camps in Eastern Bosnia. The northern camps recorded in this way are located in Manjača, Keraterm, Omarska, Trnopolje, and Luka (*Skjelsbaek, 2001, p. 220*).

The ethnic cleansing campaign in Foča region and conflict-related sexual violence, as a part of it, maybe the most embarrassing camp in this respect, with cases carefully examined by the court and reported by eyewitnesses. It is reported that the prisoners were kept here on the pretext of interrogation, that women and girls were raped by Serbian soldiers in the huts in the region, a 24-year-old woman was raped by at least 10 different soldiers here, and a 15-year-old girl was raped by at least 3 soldiers (*Burges, 2004, p. 6*). When talking about the rape cases, it should be noted that the victim is not only Muslim/Bosniak women, and other forms of violence against women are also seen in these concentration camps. A 39-year-old Croatian woman, who was raped in Omarska region of Northern Bosnia and Herzegovina, described how women were beaten, intimidated, and humiliated along with sexual violence (*Human Rights Watch, 1993, p. 164*). The statements of another unnamed female victim from Bosnia are as follows: "I thought my body was going to be torn. I did not have a single place on my body that they did not hit." (*Kovačević et al., 2011, p. 112*). It is clearly seen in the Bosnian example that all kinds of male violence are resorted to in female bodies.

If we talk about the third type of rape, it is a type of mass rape which has gone hand in hand with the prostitution industry. The third type of rape was systematically carried out on women detained in a particular location, and another type of sexual violence was observed when these women were forced to work in military brothels.

### **3.2. Forced Prostitution in Bosnia**

This type of sexual violence, simply expressed as forced prostitution, is a practice carried out in conjunction with systematic rape. In 2001, in its proceedings on methods of sexual violence in Bosnia, the International Criminal Tribunal for the Former Yugoslavia labelled rape and sexual slavery as "crimes against humanity" (*Boose, 2002, p. 71*).

The Bosnia and Herzegovina report (1994) of the Committee on the Elimination of Discrimination against Women (CEDAW) made the following statements: "Women were detained in approximately 200 camps. These camps have witnessed massive rape, forced prostitution, and other abuse. There are examples of camps, restaurants, and hotels where such abuses are experienced on a large scale." (*CEDAW, 1994, p. 1*).

Trešnjevka, which is a women's refugee organization based in Zagreb, identified 17 brothels in which women were forced into prostitution from April 1992, when the Bosnian War officially began, to March 1993 (*Bora, 1999, p. 152*). Vilina Vlas Hotel, located in the town of Višegrad, is one of the locations used for this purpose. Operated today as a tourist resort, this hotel was used for murder, torture, and sexual violence nearly 25 years ago by war criminal Milan Lukić, who was the leader of White Eagles, a Serbian paramilitary group. Eyewitnesses said that young girls and women, some of whom were only 14 years old, were locked in the rooms of this hotel, soldiers from the White Eagles came here to take away the girls they wanted, and that only the lucky ones from them came back to their families, but some girls were never seen again (*Kelly, 2018, p. 1*). Today, the various furniture in the hotel is wartime furniture, the bed mattresses have been changed but the headboards are from the Bosnian War era. The stony areas of the hotel have been cleaned from blood and the place that once was the place of death is now a swimming pool. Bakira Hasečić, who is a war victim from Višegrad and also the founder of the Women's Association of War Victims, stated that the beds which are opened for hotel visitors today are beds where dozens of women were raped years ago and according to statements of the witnesses, approximately 200 women were being held in the hotel (*Harrison, 2018, p. 1*).

Partisan Sports Hall was another such location where women and girls were subjected to sexual violence and torture. Women prisoners, who were brought here from various settlements in Foča, were forcibly taken to the surrounding houses and especially to the Zelengora Hotel by armed military groups of three or four for sexual abuse. Victims were systematically subjected to sexual harassment, verbal abuse, and they were raped day and night, therefore, blood, visible open wounds and evidence of physical torture were found on their bodies (*Burges, 2004, p. 7*). In its allegations against Dragoljub Kunarac, who was tried for systematic sexual violence crimes in the town, the International Criminal Tribunal for the Former Yugoslavia stated that one of the captured girls was only 12 years old, that the girl was bought by one of the accused soldiers, that young girls and women in the region were hired and loaned to soldiers,

that some of them were forced to prostitution for months (*ICTY, 2001, p. 2*).

### 3.3. Forced Pregnancy in Bosnia

Another type of sexual violence, expressed as compulsory impregnation or forced pregnancy, is a separate crime that is carried out with systematic rape policies, but different from rape (*Fisher, 1996, p. 107*). During the Bosnian War, both concentration camps and other military rape centers were recorded as places where pregnancies were targeted. In these locations, the rapes were continued repeatedly until the victims became pregnant (*Skjelsbaek, 2001, p. 220*). A study conducted by the University of Michigan revealed that women were raped at least 10 times for 21 days, women were detained until the end of a healthy abortion period and pregnancy was made compulsory in Bosnia according to forced pregnancy policies (*Fisher, 1996, 112*).

The most important indication that pregnancy is specifically targeted in cases of sexual violence is that the perpetrators, Chetnik<sup>3</sup> guerrillas, were particularly interested in captive women who may conceive. Guerrilla members did not deal with women who have already pregnant by their husbands and whose pregnancies were still continuing. They clearly stated that these women were not currently available for a second pregnancy and were interested in the other women who could give birth to Chetnik babies for them (*Fisk, 1993, 1*).

A side campaign, accompanied by a forced pregnancy campaign in the Bosnian War, aimed to prevent abortion. Preventing a pregnant woman from terminating her pregnancy voluntarily is another form of sexual violence. Women who became pregnant in Bosnia were prevented from having abortions and women died while trying to have their babies aborted in unsanitary conditions (*Bora, 1999, p. 153*).

A tragicomic point here is that on top of all the experiences of sexual violence, religious authorities issued a fatwa about the continuation of the pregnancies or how long abortion is permissible. Religious institutions are one of the most prominent institutions of the patriarchal communities, as the main authorities that bear the banner of conservatism, and they stayed away from understanding the suffering of women who were unwillingly conceived and tortured, and they also instructed them on abortion. It is a very painful fact that women see a partial value

---

<sup>3</sup> Chetnik: An adjective denoting the nationality with which guerrilla groups that support Serbian nationalism define themselves. (Banac, 1997, p. 113.)

through their femininity and motherhood, not as a wounded and suffering person, with the roles assigned to women by the patriarchal society.

#### **4. Dimensions and Impacts of Sexual Violence in Bosnia**

The qualitative and quantitative measurement of the sexual violence crimes committed in Bosnia was not easy for those working on the subject. The main reason for this situation is that the international authorities, who may have the power to prevent the bad course of the war, avoid being accused of not hindering the situation. In other words, institutions and organizations that have not produced efficient policies for the prevention of rape crime avoid the responsibility that may arise in the face of the magnitude of the cases, and therefore it is not possible to reach objective data. To put a second reason, another situation that makes it difficult to determine the extent of sexual violence is the traumatic crisis, which continues in the years after the war, experienced by women victims of rape. For example, a doctor treating 65 sexually abused women in Camp Trnopolje said that only 15 of them had been able to admit to being raped (Ross, 2012, p. 2).

Field studies on sexual violence in the Bosnian War revealed that every woman who was a victim of conflict-related sexual violence was raped an average of 100 times (Özbaş, 2008, p. 177). The total number of cases ranges from 20.000-50.000. The lower limit of the number line, 20.000, is the data provided by the European Commission. The number 50.000 belongs to the War Crimes Investigation Commission of Bosnia and Herzegovina (Jones, 1994, p. 117). An important point to be mentioned about the balance sheet of the Bosnian War is that although it is evident with the data that the majority of the victims are Muslim women, other Yugoslavian women, especially Croatian and Serbian women, also had their share of this painful picture. Therefore, conflict-related sexual violence is an ethnic cleansing method but in the Bosnian War, it was also a direct reflection of patriarchal values on female bodies without regarding any ethnic and cultural identity. In this case, it is necessary to describe sexual violence as a situation that separates and polarizes men and women in two ways.

The anti-militarist women's movement in Yugoslavia has increased since the beginning of the war. Feminist academician Cockburn, who has worked in the Yugoslavia field and has worked in women's associations in the region for a period, establishes a relationship between the dissolution of the Socialist Federal Republic of the Yugoslavia and the rising women's mobilization in the region (Cockburn, 1999, p. 8).



Women victims of the Bosnian War have showed mobilization as a reaction to their painful experiences since the beginning of the war. One of the most important reflections of this mobilization in the international arena is that women have succeeded in influencing international public opinion thanks to their mobilization potential, lobbying activities, and bringing sexual violence to the legal dimension. The International Criminal Tribunal for the Former Yugoslavia is also one of the results of women's work in this field (*Harbour, 2016, p. 21*).

Women's Court, the most productive women's organization operating with a feminist claim in Yugoslavia, is today the largest women's network operating not only in Bosnia but also in other territories, which have separated from the Former Yugoslavia. Croatia, Kosovo, Macedonia, Montenegro, Slovenia and Serbia are some of these centers. The main goal of the Women's Court movement is to prevent all kinds of injustice from gender inequality. Regarding this goal, the Women's Court movement creates public opinion against militarist policies, it also tries to find solutions to common patriarchal problems such as poverty of women and exploitation of women's rights in workplaces. The activities of this organization for women victims are to ensure that war crimes are brought to the judiciary and to create public opinion to establish the necessary justice institutions (*Kovačević et al., 2011, 11-12*).

## 5. Conclusion

Since the patriarchal structure of Yugoslavian societies makes women of the nations a symbol of honor, a significant portion of the conflicts in the region are of a sexual dimension. Therefore, what makes a woman target is, of course, the ethnic and religious sensitives to which she belongs, but the main danger is to her femininity. In the case of the Bosnian War, gender roles were reproduced in the case of militarization and women became the real victims of this war.

With the threats brought about by war and militarization, women's mobility has increased in the Yugoslavia region and social identity awareness has become more active. Yugoslavian women have become more active in the field of civil society as of the war period. For example, the Medica Association, which was founded in 1993 as Zenica-based, is today an organization operating in the international arena. It is possible to see how women's identity and gender consciousness were affected by the experience of war in *Cockburn's sentences*: "*I tried to be useful in financial resources role in the information section of Medica. My aim was to understand the ideas, processes, and practices that enabled them to set*

*aside the divisive problems posed by the militarized nationalist ethnic cleansing project in the region."* (Cockburn, 2013, p. 26). It appears that Yugoslavian women went beyond their ethnic and religious identities and came together and engaged in feminism studies simply because they were women and had similar experiences.

Since the beginning of the 1990's, awareness of women's identity has increased in the region. In this sense, the thesis that war and militarization increased women's mobility is confirmed. To put in another sentence, female victims preferred to rise by holding on to each other, instead of blaming each other by dividing as Bosniak, Serb or Croatian. Thus, on the female side of the Bosnian War, which had polarized between males and females, unification was observed, instead of separation.

### **Bibliography:**

**Banac, I., 1997.** Sırbistan'da Milliyetçilik. [Nationalism in Serbia]. In: Yeni Balkanlar Eski Sorunlar. Ed. Özcan, G. and Saybaşılı, K., İstanbul, pp. 87-116.

**Basic, G., 2015.** War Violence, Victimhood and Reconciliation: in Stories of Bosnian War Survivors, Proceedings of the Conference "I too: Remember Dust: Peace-Building, Politics & the Arts". September 7-8, 2015, Winchester, U. K., pp. 1-15.

**Boose, L., 2002.** Crossing the River Drina: Bosnian Rape Camps, Turkish Impalement and Serb Cultural Memory. In: Journal of Women in Culture and Society, 28(1), pp. 71-96.

**Bora, T., 1999.** Yeni Dünya Düzeninin Av Sahası: Bosna-Hersek. [The Hunting Ground of the New World Order: Bosnia-Herzegovina.] İstanbul.

**Burges, P. M., 2004.** Prva Sesija: Istrage, Proceedings of "Približavanje MKSJ-a Localnim Zajednicama u Bosni i Hercegovini Transkript Konferencije Foča". October 9<sup>th</sup>, 2004, Foča, Bosnia and Herzegovina, pp. 3-24.

**Cockburn, C., 1999.** Gender, Armed Conflict and Political Violence, Proceedings of „The World Bank Washington DC“, 10-11<sup>th</sup> June, 1999, Washington, U.S.A., pp. 1-26.

**Cockburn, C., 2010.** Gender Relations as Casual in Militarization and War. In: International Feminist Journal of Politics, 12, pp. 139-157.

**Cockburn, C., 2013.** Barış Ne Zaman? Üç Ülkede Kadınların Barış Anlaşmaları Sonrası Deneyimleri: Kuzey İrlanda'da, Bosna Hersek'te ve İsrail-Filistin'de Kadınların Barış Umutlarına Ne Oldu? [When is Peace? Women's Post-Accord Experiences in Three Countries What Has Happened to Women's Hopes for Peace in Northern Ireland, Bosnia-Herzegovina and Israel-Palestine?] In: Feminist Eleştiri. Tr. Sarıtaş, E., 5(2), pp. 26-37.

Committee on the Elimination of Discrimination against Women (CEDAW), 1994. Special Report: Concluding Comments of the Committee on the Elimination of Discrimination against Women (A/49/38).

**Crowe, J., 2015.** Coercion, Consent and Sexual Violence in Wartime, Proceedings of "University of Queensland Red Cross Society Talking". April 29<sup>th</sup>, 2015, Queensland University, Brisbane, Australia, pp. 1-5.

**Diken, B. and Laustsen, C., 2005.** Becoming Abject: Rape as a Weapon of War. In: *Body & Society*, 11(1), pp. 111-128.

**Enloe, C. 2006.** Manevralar: Kadın Yaşamının Militarize Edilmesine Yönelik Uluslararası Politikalar. [Maneuvers: The International Politics of Militarizing Women's Lives]. Tr. Çağlayan, S. İstanbul.

**Enloe, C. and Cockburn, C., 2012.** Militarism, Patriarchy and Peace Movements. In: *International Feminist Journal of Politics*, 14(4), pp. 550-557.

**Fisher, S., 1996.** Occupation of the Womb: Forced Impregnation as Genocide. In: *Duke Law Journal*, 46(1), pp. 91-133.

**Fisk, R., 1993.** Bosnia War Crimes: "The Rapes Went on Day and Night": Robert Fisk, in Mostar, Gathers Detailed of the Systematic Assault on Muslim Women by Serbian "White Eagle" Gunmen. [online] Available at: <https://www.independent.co.uk/news/world/europe/bosnia-war-crimes-the-rapes-went-on-day-and-night-robert-fisk-in-mostar-gathers-detailed-evidence-of-1471656.html> [Accessed February 8th 1993].

**Gallagher, T., 2003.** The Balkans After the Cold War. New York.

**Goldstein, J. 2001.** International Relations. New York.

**Gutman, R., 1994.** Foreword. In: *Mass Rape: The War Against Women in Bosnia-Herzegovina*. ed. Stiglmayer, A., Lincoln, pp. 9- 13.

**Harbour, G., 2016.** International Concern Regarding Conflict-Related Sexual Violence in the Lead-up to the ICTY's Establishment. In: *Prosecuting Conflict-Related Sexual Violence at the ICTY*. Ed. Brammertz, S. and Jarvis, M., Oxford, pp. 19-32.

**Harrison, E., 2018.** Back on the Tourist Trail: The Hotel Where Women Were Raped and Tortured. [online] Available at: [https://www.theguardian.com/world/2018/jan/28/bosnia-hotel-rape-murder-war-crimes?CMP=share\\_btn\\_link](https://www.theguardian.com/world/2018/jan/28/bosnia-hotel-rape-murder-war-crimes?CMP=share_btn_link) [Accessed January 28<sup>th</sup> 2018].

Human Rights Watch, 1993. *War Crimes in Bosnia-Herzegovina Volume II*. United States: Helsinki Watch.

International Criminal Tribunal for the Former Yugoslavia, 2001. Judgement of Trial Chamber II in the Kunarac, Kovač and Vuković Case (JL/P.I.S./566-e).

**İşiközlü, E. and Millard, A., 2010.** Brief 43: Towards a Typology of Wartime Rape. Bonn.

**Jones, A., 1994.** Gender and Ethnic Conflict in ex-Yugoslavia. *Ethnic and Racial Studies*, 17(1), pp. 115-134.

**Kovačević, L. et al., 2011.** Ženski Sud: Feministički Pristup Pravdi. Serbia.

**Kovalovska, A., 1997.** Rape of Muslim Women in Wartime Bosnia. In: *ILSA Journal of International & Comparative Law*, 3(3), pp. 931-945.

**Kreft, A. K., 2018.** Responding to Sexual Violence: Women's Mobilization in War. In: *Journal of Peace Research*, 10, pp. 1-13.

**Özbaş, Z., 2008.** Cinsel Silah ve Grbavica. [Sexual Weapon and Grbavica]. In: *Marmara İletişim*, 13(13), pp. 171-185.

**Ross, J., 2012.** Projections of Complicity: Narratives of Rape Survivors in War-time Bosnia, 1992-1995. Proceedings of "Western Oregon University History Department Senior Seminar", Spring 2012, Oregon.

**Seifert, R., 1994.** War and Rape: A Preliminary Analysis. In: *Mass Rape: The War Against Women in Bosnia-Herzegovina*. Ed. Stiglmayer, A., Lincoln, pp. 54-72.

**Sharma, D., 2017.** Women in Times of War and Conflicts: The Misery of Sexual Violence, Fear and Pain. In: *International Journal of Scientific Research & Development*, 7(9), pp. 1038-1039.

**Simons, M., 1983.** The Silencing of Simone de Beauvoir Guess What Missing from The Second Sex. In: *Women's Studies International Forum*, 6(5), pp. 559-564.

**Skjelsbaek, I., 2001.** Sexual Violence and War: Mapping Out a Complex Relationship. In: *European Journal of International Relations*, 7(2), pp. 211-237.

**Tickner, A., 1992.** *Gender and International Relations: Feminist Perspectives on Achieving Global Security*. New York.

United Nations General Assembly, 1994. Rape and Abuse of Women in the Areas of Armed Conflict in the Former Yugoslavia (A/RES/48/143).

**Webster, K., et al., 2019.** Conflict, Peace and the Evolution of Women's Empowerment. In: *International Studies*, 18(2), pp. 265-272.

**Zalewski, M., 1995.** Well, What is the Feminist Perspective on Bosnia? In: *International Affairs*, 72(2), pp. 339-356.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.16>*Kakha Putkaradze**Ivane Javaxishvili Tbilisi State University (Georgia)*

[kaxaphutkaradze@gmail.com]

## Issues of Religious Fundamentalism and Radicalization in Georgia

**Abstract:** *The paper Issues of Religious Fundamentalism and Radicalization in Georgia refers to the proper study and analysis of the political, economic, cultural factors, external and domestic influences in the region. It focuses on the vulnerabilities of certain sections of the population living in the region, their views and attitudes. To what extent is it possible to incite religious fundamentalism and radicalism in the population of the region and what part of the target group can resort to extremism. The study emphasizes the importance of external forces and factors in shaping the mood of the population. It also answers the question of whether it is possible for an interested party to influence and manipulate the target group.*

**Key words:** *Religion; radicalization; fundamentalism; Security; Politics.*

### Introduction

The collapse of the Soviet Union in 1991 was followed by serious geopolitical shifts in the world and the Caucasus region. The existing bipolar world security architecture has collapsed, leading to the emergence of ethnic, religious, regional or local conflicts in some regions. The disappearance of the Soviet Union as a legal entity eventually led to the disappearance of the last communist ideology. The failure of communist ideology took up a huge ideological space that the post-Soviet countries had to replace with their own national ideological system. The disruption of the existing world order has given rise to new regional states in the international arena. They were already trying to pursue their own geopolitical interests in the post-Soviet countries. The interests of large states often did not coincide with the domestic and foreign vectors of small countries, therefore the processes in the Caucasus and the region became irreversible and became a significant problem. One of the many problems in this regard is the problem of Islamic fundamentalism and radicaliza-

tion in the region. The openness of the ideological space in the post-Soviet space has given an unprecedented opportunity to individual Muslim, Christian ideologies. The attempts of individual states to gain control of Georgia through attempts at Islamic ideological expansion, the stirring up of the Arab Spring, and the developments in Syria and Iraq have fueled attempts to radicalize the population in Georgia on religious and political grounds. Radical views have emerged in certain segments of society. It manifested itself in a sharp negative attitude towards the political order in the country, which was motivated by religious, economic, social and political motives. The radical views of religiously motivated ethnic Georgians among a small part of the Georgian population made it possible to stir up extremist ideas in the target group. Moreover, a small part of them were provided with travel to Syria and Iraq and participation in hostilities for terrorist purposes.

Given the above, the study aims to answer the question: *Is there a real threat of religious fundamentalism, radicalization and extremism in Georgia? What factors led to the export of radical and political Islamic ideology to Georgia?*

In the process of assessing the threat of religious fundamentalism in Georgia and the problem of radicalization, it is important to properly study and analyze the situation in Georgia, in particular the Pankisi Gorge populated by Muslims.

Pankisi gorge is located in Kakheti region of Eastern Georgia, Akhmeta municipality. The gorge is located along the Georgian-Russian border. The Kists, like other mountain peoples living in the Caucasus, religious had no special significance and role in their public and political life. Instead the mountain peoples have always paid great attention to local customs and traditions.

On April 9, 1991, the Act on the Restoration of Georgia's Independence was signed, thus finally liberating the country from the Soviet regime. An already independent though politically, economically weakened country has failed to assume an ideological function. This has led to the uncontrolled entry of emissaries and financial organizations into the region. They were opened, funded by various organizations, schools, some of the young people were sent to study abroad.

The collapse of the Soviet Union provided new opportunities for states such as Turkey, Iran, and other Arab, Islamic countries. The military operations in the Caucasus region also accompanied these processes. Economic inequality between countries has triggered migration processes, at the same time making the export of values more

tangible in the region. Finally, we are faced with the reality where the internal, economic, social and cultural factors contributing to religious fundamentalism and radicalization are compounded by the external informational political-religious factors of fundamentalism and radicalism.

It should be noted that such actions are no less relevant today. Since the period of independence, Georgia has already shown signs of radicalization of the population, and a small part of the Muslim population is interested in Wahhabi Islamic ideology, especially among young people. The statements made by the politicians, the campaign produced by them, was initially built on the national feelings and values of the Georgian nation. Accordingly, a public mood was formed which helped to separate the ethnic Georgian community from other ethnic communities living in Georgia. In parallel with the named processes, the interest of foreign Countries and organizations in Georgia to the ethnic, religious communities living in Georgia became even more obvious. The successful spread of Islamic ideological exports, if at that time was considered less of a threat in Georgia, today it has become a serious challenge for the country. Manipulation of beliefs/issues communities has led to disagreements in the region between Christian Georgians and Muslim Georgians, ethnic Georgians, and ethnic Muslim Georgian citizens. Influenced by interested party, various religious or non-governmental organizations have emerged in the region with the aim of promoting religious issues in the region and strengthening the influence of political Islam.

In 1993 Journal of Foreign Affairs published Samuel Huntington's article „Clash of Civilizations“, where the author was prophesying a war between cultures in the 21st century. The events of September 11, 2001 brought new life to the author's view. This has forced Western countries to reconsider their policies towards the religion and its followers. If we are guided by the opinion that religious radicalism is a form of political violence that seeks to influence the state and its policies, the international community by sowing fear and mistrust in society, we can say that the first phase of psychological warfare ended in favor of the so-called ideological actors in Georgia.

### **For a theoretical-scientific understanding of fundamentalism and radicalization**

There is no exact definition of fundamentalism, radicalization to date. In different geographical-political areas we find different approach-

es to its explanation. In spite of everyone agrees that it is an evocation of certain feelings, views, beliefs, which over a period of time acquires radical, violent methods. Religious fundamentalism in turn does not necessarily imply terrorism. Since the terrorist attack in 2001, a large part of the public has been discussing the combination of religious fundamentalism with the terrorism. In a 1996 article published by Walter Laqueur, he predicted that terrorist acts carried out by religious fanatics would increase. The author also highlights the causes of possible violence act by religious fundamentalists and uses historical religious traditions as its basis.<sup>1</sup> In his work „Fundamentalism and Ethnicity A Global Perspective“, Jeff Haynes defines fundamentalism when fundamentalists seek to change existing laws, rules, and state systems based on religious rules, which they believe will help shape a traditional society. It distinguishes between two forms of fundamentalism. 1) religious fundamentalists; 2. Fundamentalist movements formed on a national- basis.<sup>2</sup> It should be noted that both currents have both common and different features, but both are equally dangerous to the state and society.

As for radicalization, it is a process in which a person is critical of the existing socio-political system and is ready to use violent methods to change it, while religious fundamentalism is one of its contributing factors. The use of violent methods at such times is, in their view, an attempt to gain much greater good. There are different definitions of religious fundamentalism and radicalism in existing scientific circles and different methods of combating it. Makeu and Moskalenko consider the possibility of developing values and attitudes, in the case of which a person is ready to help a particular group or to be the inspirer of the origin of the conflict. Religious fundamentalism and radicalization in turn do not necessarily mean the need to violently change the existing socio-political system, it also provides for legal means of struggle. Makeul and Moskalenko distinguish between fundamentalism, radicalization and activism in this regard. In particular, if fundamentalism and radicalization are seen as the ability to develop values and attitudes whenever it is possible to inspire conflict, activism implies the need to change the existing political system only through legal means. Numerous scientific theories or approaches try to explain fundamentalism, radicalization as a phenomenon, but to date there is no universal way to explain its causes and events in a uniform way. Accordingly, the approach in Georgia is different, which is related

---

<sup>1</sup> **Walter Laqueur. 1996**, pp. 24-36; also, **Walter Laqueur. 1999**.

<sup>2</sup> **Jeff Haynes. 1995**.



to the existing geopolitical factors and the way of life in the region, in the society. „Adat“ (traditions) law also plays an important role, which has not been properly studied by scholars to date. It should also be noted that radicalization is often directly linked to terrorism, which is completely unacceptable. Well-known scientist Bongar explains that some radical people can indeed be characterized by the psychological traits of a terrorist, although he disagrees with the direct link between radicalism and fundamentalism<sup>3</sup>, on the contrary, religious fundamentalism may be one and not the only cause of population radicalization.

In this regard, the ethnic Kist, Azerbaijani and Georgian (Adjara) Muslim communities living in Georgia are interesting. It is noteworthy that with regard to Kists and ethnic Georgians there is no problem of integration into society (Kists are fluent in the Georgian language, customs, perfectly adapted to Georgian society), we see a different picture on the example of the Azerbaijanian community. On the one hand, it is due to the proximity of the border with Azerbaijan, as well as the less involvement of the Georgian state in the region. It is also noteworthy that despite the integration of Kists and Georgians (Adjara) into Georgian society, people from the two communities / regions mentioned above have gone to the ongoing war in Syria. In the case of the Azerbaijani community, this issue is relatively rare for the current stage.

According to Dalgard-Nielsen, an important circumstance of the radicalization of the individual is the problems related to his own identity, while the person is looking for a group, environment, ideology where he can realize himself.<sup>4</sup> This theory is less relevant to the reasons for the presence of ethnic Kist fighters in the ongoing conflict in Syria, which in our opinion is due to the cultural-historical proximity of mountain Georgia (Svaneti, Khevsureti, Mtianeti, Pshavi, etc.) to the peoples of the North Caucasus. In some cases, there is also an attempt to deliberately demonize religious communities. It is, among other factors, one of the major factors in the radicalization of the Christian and Muslim groups.

The theory of social groups is also important for the Georgian reality. According to Sageman, it is a systematic process of personal involvement, training, participation in violent activities. Friends,

---

<sup>3</sup> Bongar, Bruce. 2007.

<sup>4</sup> Neumann, Peter. 2008.

relatives, close people, religious groups, informal meetings, and educational, religious institutions play an important role here.<sup>5</sup>

In this regard, there is a clear tendency for uncontrolled opening of unofficial religious or secular schools in Georgia. The number of informal meetings is quite frequent in such schools. The educational process is not carried out in accordance with the rules established by the Ministry of Education of Georgia, which is a real basis for questioning the objectivity and quality of education.

Thus, the actuality and radicalization of the issue of religious fundamentalism of the population in the Georgian reality is largely determined by the existing socio-economic environment, the existing political, religious, ideological sentiments, ethnic divisions in the region and attempts to influence foreign political forces.

### **The threat of religious fundamentalism in Georgia, myth or reality?!**

In the light of the developments in the Middle East, the threat of religious fundamentalism is being discussed in the international community, including in Georgia, by certain politicians, experts or a group of the population. To prove this, they often talk about the participation of their citizens in the ongoing war in Iraq and Syria and the frequency of terrorist acts in Europe.

Given the influx of citizens from the United States, Europe, Asia, and Africa (including Georgia) into Syria, readers may be able to discuss the validity of this position. In this regard, the processes developed in Georgia are interesting. In order to judge whether there is a threat to religious fundamentalism in the region, including Islamic fundamentalism, we must first explain what Islamic fundamentalism means and how it differs from traditional Islamic wings.

The modern understanding of traditional Islam in the world implies the existence of a secular system of government in the state. At such times the state and religion are strictly separated from each other. No religion enjoys an advantage in the state, while the state does not interfere in religious matters and vice versa. Traditional Islam is quite kindness with regard to human rights. It also does not preach the rule of the state according to Islamic norms, the governing system in the country and the legislation is not a system based on Islamic law, Sharia. Yet, if

---

<sup>5</sup> Asta Maskaliūnaitė. 2015.

the majority of the country's population is Muslim, this does not mean reducing the role of Islam in public administration and politics. In turn, traditional Islam is divided into two main Sunni and Shiite wings. The Georgian and Kist populations represented in Georgia belong to the Sunni sect, while the Azerbaijani community in Georgia is a follower of Shiism.

Unlike traditional Islam, Islamic fundamentalism rules out the existence of a secular state. Moreover, in their view, the formation of the state should be based on Islamic law and the basic legislation should be Islamic law - "Sharia law". Fundamentalist Islam preaches the need to introduce a system of life in the time of Muhammad. It implies the practice of daily life in which it is forbidden to drink alcohol, have fun, sing, the most severe punishment will be imposed for crimes, the already limited rights of women in secular life will be severely restricted. Fundamentalist Islam views Islam as the main defining force of the country's domestic and foreign policy, ideology.

It should be noted that both traditional and fundamental Islam or Islamic ideology are used today as a tool to pursue geopolitical interests. It implies the creation of a common Islamic state. It is noteworthy that the fact that Islam emphasizes the importance of religion before the state, therefore focusing on the creation of a common Islamic state is nothing more than an attempt to pursue geographical, political, economic, energy interests.

The 1979 Islamic Revolution in Iran is considered a geopolitical impetus for the revival of fundamentalist Islam. After the overthrow of the Shah by the Islamic leader of Iran - Ayatollah Khomeini, the government of the country was based on Islamic law. A corps of Iranian Revolutionary Guards was set up to protect the Islamic order established by them. The supreme authority was defined not by the President, the Prime Minister and / or the Speaker of the Parliament, but by the supreme spiritual leader, Ayatollah Khomeini. Ayatollah Khomeini is also the chairman of the country's National Security Council. Any change of government is first and foremost agreed with Ayatollah Khomeini. There is an important difference between fundamental Islam and traditional Islam in relation to the attitudes of the believer, in particular his attitudes towards his fellow man, his neighbor. Whereas traditional Islam implies living in a tolerant environment, respecting and accepting the religious beliefs of a neighbor. In the case of fundamental Islam, if this citizen lives in an Islamic state, he or she must follow the rules of Islamic life,

otherwise he or she must either leave the country and / or sever all kinship, friendship, and service relations with the true Islam followers.

Despite the differences, both currents have a common feature. According to the Islamic faith, religion always stands above the state. Consequently, religious values carry a higher value than the secular way of life, traditions and system of government in the state. Traditional Islam implies respect for the state and its rules, but if a Muslim is unable to follow the rules of Islamic principles, a "true Muslim" must leave the country, even if he is a citizen of that country and belongs to an ethnically dominant ethnic group in the country.

The fact that, according to the Islamic worldview, it puts religion ahead of the state makes it possible to use it for political and / or other purposes. Tamar Chikovani focuses on examples of unification around the Islamic faith and highlights the issue of their coming to the political arena when they are a minority. "It is noteworthy that Muslims organize in politics based on faith, which is only due to the fact that Muslim elites perceive faith as the most effective means of maintaining or gaining political power."<sup>6</sup> In other words, the politicization of Islam is in the face, which should become a subject of serious consideration for the Georgian reality. Of course, at the current stage, the Muslim community in Georgia does not have enough human, financial, intellectual resources to appear as a full-fledged political force in the Georgian political space.<sup>7</sup> Attempts to consolidate the Muslim community around Islamic ideology and enter the political arena using Islamic ideology will be a very dangerous precedent for Georgia and the region in general. In this regard, it is necessary to find out who is behind the individuals, social or political groups who directly and / or indirectly support the above group. Also what is the purpose of creating such stimulating moods.

The views of modern religious leaders or leaders of terrorist organizations on Islam are noteworthy. They see Islam as an opportunity to expand political influence and an alternative model of state governance, in which the expansion of territories will be based on the spread of Islamic ideology, and the system of government will be built on Islamic principles. "There is no such thing as a compromise in the dictionary of Islamic culture. According to the spiritual leader of "Hez-

---

<sup>6</sup> Nino Chikovani. 2012, p. 45.

<sup>7</sup> Interview with Taniel Nakaidze, head of the Georgian Muslim Union - Kakha Putkaradze, September 12, 2017, Batumi.

ollah", the Islamists will try to expand the Islamic space by any means.<sup>8</sup> One of the leaders of the Iranian opposition stressed the absence of moderate fundamentalists because for him a moderate fundamentalist was equated with a moderate Nazi.<sup>9</sup>

Experts and politicians have been talking about strengthening the positions of fundamentalist Islam in the region since the 1990s. Due to the participation of representatives of the North Caucasus, including Arab countries (Syria, Jordan, Saudi Arabia, Turkey) in the Abkhaz conflict, certain political groups or external forces may have artificially viewed the conflict in a religious context, despite Abkhazian Christianity. This was based on Islamist groups created at the time by Islamic emissaries in the region and by special services/forces officers from Syria in Abkhazia. That is why Nino Chikovani uses the views of the Swedish scholar Sant Cornel and links the conflicts in the region to issues related to ethnic identity, while religion is mentioned as a one of the factor that determines ethnicity and stimulates the mood of the population.<sup>10</sup> In this regard, the well-known article "Crossroads and Conflict: Security and Foreign Policy in the Caucasus and Central Asia" is interesting, according to which the processes in the Caucasus are the result of a Soviet legacy and its collapse, where religion is one of the main causes of conflict.<sup>11</sup> This view is significantly related to the developments in the region and in Georgia, although the changed geopolitical, economic, political and physical geography over the last 20 years can give religion a serious significance for Georgia at the present stage. In this regard, there are attempts to politicize Islam in the region, and on the other hand, the statement of the Islamic Caliphate, according to which Adjara is within the borders of the United Islamic Caliphate. The Threat of Islamic Fundamentalism is discussed in an article published in Radio Liberty in July 2003. The article cites the so-called Gulen schools that implement and propagate fundamentalist ideas and views through the education system. "There was talk that Islamic fundamentalism is developing in some regions of Georgia, that is, the mission of Feytula Gulen. This

---

<sup>8</sup> Islam - religion or weapons in the hands of extremists? Bulletin of the Foreign Policy Research and Analysis Center of the Ministry of Foreign Affairs of Georgia, # 4, Tbilisi, 1998, p. 3.

<sup>9</sup> Nino Chikovani. 2012, p. 47.

<sup>10</sup> Ibid, p. 45.

<sup>11</sup> Crossroads and Conflict. Security and Foreign Policy in the Caucasus and Central Asia. Ed. by Gary K. Bertsch, Cassady Craft, Scott F.Jones, and Michael Beck. Routledge, New York-London, 2000, p.8

refers to the mosque and madrassa built in the village of Mere Kesalo. Language is lost, faith - faith, in what way, you know? "If you ask a child in that madrasa what nationality you are, he/she says I am a Muslim."<sup>12</sup> According to Niaz Husseinov, the centers of Islamic fundamentalism in Tbilisi are: Demirel College, Refains' School and International Black Sea University, and in Abkhazia - Basharan College in Agudzera. The author of the article emphasizes that the Turkish generals and the government are against Gulen's activities, and that his educational activities are a means of spreading fundamentalist views in Georgia. The date of publication of the article is noteworthy, 2003, i.e. when the positions of the current President Recep Tayyip Erdogan were not yet firmly established in Turkey. We cannot agree with the author's view that the Turkish authorities were against Gulen's activities at the time, because the children of Turkish diplomats, Turkish and Georgian businessmen studied at the Demirel College in Adjara as well as in Tbilisi.

At the current stage in the region, we do not think it is right to talk about the threat of Islamic fundamentalism. However, this does not mean that there is no focus on the stimulus indicators that promote and propagate radical, extremist, fundamentalist Islamic ideas. Identify organizations and countries whose strategic interests include pursuing a foreign policy course based on religious and national affiliation are present. In this respect, the Caucasus itself, including Georgia, in particular the Pankisi Gorge, is interesting. As you know, the Caucasus has long been a crossroads of world cultures and civilizations, where people of different nationalities, cultures and ideologies traveled and lived systematically. Georgia itself is interesting, which has been an important area of contact between Christian and Islamic cultures and civilization for centuries. Scientists focus on the problems that arise during the contact of cultures and link it to geopolitical processes: the focus of scientists is on borderline processes between civilizations, peoples, countries. Ethnic, confessional, geopolitical, cultural-historical and other processes intersect and interfere with each other, creating an area of communication space characterized by high border energy. Boundary can be considered cultural spaces that are located on the edge of civilizations and have direct contact with the periphery of a neighboring civilization. Such areas are considered to be the boundaries of civilizations (contact

---

<sup>12</sup> Kakha Mchedlidze. 2003.

zones), marginal cultures / subcultures, socio-cultural boundaries, etc.<sup>13</sup> We want to show that during the Soviet period there was a confrontation of cultures in the region, which meant the complete rejection and ignorance of one culture and / or ideology by another culture / ideology. Already in modern Georgia we met separate examples of cultural confrontation. Which means the alienation and unacceptability of the Christian and Muslim Georgian communities. It is noteworthy that if in the first years of independence a similar trend was not observed in the population, at the present stage religious issues are raised and the national feelings of the society are manipulated. Consequently, the question arises whether religious issues are artificially activated and whether it is included in the strategic, political interests of external or internal forces? Is the tendency of religious intolerance between ethnic Christian and Muslim Georgians artificially encouraged, and if so, what strategic interests does it serve? Answering these questions will help us to avoid further tensions and to prevent possible artificially stimulated controversy in a timely manner. This will ensure the strategic interest of the country. In Georgia, the negative attitudes of the population are largely due not to the existence of a religious basis but to the difficult socio-economic conditions in the country and the region. The current socio-economic situation is the factor that led to the migration of a small group of young people from the region to Syria, the training of individual young people in madrassas, religious schools in Georgia and abroad. We are not dealing with the problem of integration of the Muslim community either, because they represent the Georgian ethnos and live on the basis of Georgian customs and traditions. Accordingly, we consider the existence of Islamic fundamentalism in the region to be exaggerated for the current stage, and raising this issue is a contributing factor to the political, economic and geopolitical interests of individual countries and groups. Dieter Senghaas clearly answers the question of what contributes to the activation of religious issues in the country, along with many other factors. According to Senghaas, religious issues are not the most important in a period of escalating conflict. Religious groups start to be active when their socio-economic status is low, and their activation is aimed at changing and / or improving this situation.<sup>14</sup> It is noteworthy that the politicization of religion in Georgia and the awakening of radical views in the population are the result of the difficult economic and political situation on the one

---

<sup>13</sup> Nino Chikovani. 2012, p. 50.

<sup>14</sup> Dieter Senghaas. 2002, p. 74

hand, at which time the situation in the region is presented as a collective problem. It is also the result of the activity of external forces and their propaganda activities. Thus, for the current stage, there is no threat of Islamic religious fundamentalism in the region. However, there is a clear attempt to politicize religion. It refers to the currents of both major denominations in Georgia (Orthodox Christianity and Islam). Analyzing the current processes in the world, we can conclude that religion has acquired geopolitical significance since the end of the Cold War. With regard to Georgia, there is a crossroads between the orthodox and Islamic religious geopolitical interests and the consequences of its possible influence.

Moscow appears to be the main political center of Orthodox geopolitics. Orthodox religion, along with other geopolitical tools, has become Moscow's main ideological tool for restoring the political, economic, and security spheres lost as a result of the collapse of the Soviet Union. In this regard, according to the famous Russian Geopolitician Alexander Dugin, today's Russia is in geopolitical uncertainty. In order for the government to prevent the disintegration of the state, Russia must not only restore its political influence in the post-Soviet republics but also create a geopolitical space where Russia's influence as a superpower in the political, economic, ideological, energy and security spheres will be much greater than it was in the Soviet Union. This implies both territorial expansion and the creation of buffer zones in neighboring states. According to Dugin, despite the fact that Georgia has always been characterized by anti-Russian sentiments, geopolitical goals should be achieved by stimulating religious sentiments, which will be presented by Georgia's acceptance of Russia's request to join the Eurasian Union.<sup>15</sup> We aimed to show the geopolitics of Orthodoxy in relation to the threat of fundamentalism in order to show the reader how it is possible to cross religious geopolitics in Georgia in the case of geopolitical interests, to stimulate proper radical religious and national feelings in the population. Observing the ongoing processes in the region, we can conclude that taking into account the religious factor in determining the foreign policy course taken by the current political forces is a necessary issue for the government. The geopolitical context of Orthodoxy is being discussed, including in the European Union, in particular the extent to which Russian influence can be expanded in the event of the accession of Orthodox countries to the EU. Malkhaz Matsaberidze, a professor at Ivane Javakhishvili Uni-

---

<sup>15</sup> Дугин А. 1999, с. 213.



versity, cites Paul Goble's article "Orthodox EU", which says that the rise of Orthodox countries in the EU will help Russia to resolve religious issues as well as to expand its political interests and influence.<sup>16</sup> In an article published by Paul Goble on January 26, 2019, "Orthodoxy does not define Russian identity or attitude towards Ukraine." The author gives important explanations about Russian political and ideological views. According to the author, despite of Russia may use religion for geopolitical purposes in Russia itself and in neighboring Orthodox countries, religion is not a key determinant of relations and foreign policy. Instead, it is an instrument of pursuing their geopolitical interests. According to the author, Russia's long-term vision in neighboring countries is determined not by religion but by its history and territories. In this regard, in the process of forming a national ideology, along with Orthodoxy, the 1917 revolution and the immortality of the Soviet Union's victory over Nazi Germany in World War II are of increasing importance. Consequently, according to the author's view, historical dates and events play a much bigger role in the formation of Russian patriotism and identity than the religion itself.<sup>17</sup> The same author is the author of a well-known article published on October 10, 2017, entitled "Russian secret services is behind the orthodox fundamentalists." In the named article, we are interested in the idea that religion and in this case Christian Orthodoxy have long been a field of special interest to Russia (still Tsarist Russia). During the tsarist period, the so-called "Okhranka" The same secret police was watching the leaders of all religions in the empire, the implementers of the religious ideology. According to the high officials of the empire, their opponents would try to use religion to threaten the interests of Tsarist Russia and the representatives of the higher authorities. At the end of the Soviet period, Orthodox, nationalist organizations and political parties were established and funded by the Union State Security Committee. The author's opinion that the strengthening of the Christian-Nationalist forces in Russia at the present stage serves to strengthen the Russian political regime and neutralize persons / parties opposed to the government to be taken in account. However, the most noteworthy factor is that in the implementation of Russia's foreign policy course, the Russian special services use the so-called Export of "Chris-

---

<sup>16</sup> Matsaberidze M. 2003, p. 6.

<sup>17</sup> Paul Goble, 2019.

tian Orthodox Jihad" to neighboring countries.<sup>18</sup> In order to give us a complete answer to the question whether there is a threat of religious fundamentalism in Georgia, we will present specific issues in our next chapter, "Pankisi Case". It sheds even more light on the developments in the region.

### **Pankisi case at the modern stage**

When discussing religious fundamentalism, we can not overlook the current developments in Pankisi. Due to the purpose of the research, the situation in the valley from 2012 to date was analyzed. In this regard, the developments in the Middle East and the questions asked in the country about the spread and strengthening of the Wahhabi ideology are interesting. The Syrian crisis has made public questions about Wahhabism even more active. A clear example of this is the periodic participation of young people endowed with Wahhabi ideology from the Valley (and not only Pankisi) in the last few years in the Syrian conflict. In order to perform the so-called "sacred duty". The problem was complicated by the low level of education of the population in Pankisi gorge (there are only 4 schools and kindergartens in the gorge). Added to this are high unemployment rates. Seniors, most of whom are men, are pessimistic about the future. They see no perspective. At the same time, individual Arab states and organizations are spending large sums of money and resources to spread the teachings of the Qur'an and Wahhabi teachings throughout the valley and throughout the country. The population associates the outflow of young people abroad with difficult social conditions. This provision is confirmed by the materials of the survey conducted by us in the gorge.<sup>19</sup> Thus, the main reasons for the departure of Georgian citizens to the Middle East should be sought in socio-economic problems. However, neither ideological motivation can be neglected. There is a growing trend of interest of Muslim countries and individual organizations in the valley. By using financial resources and missionary emissaries, they contribute to the stirring up of radical-extremist sentiments, which have detrimental consequences for the security of the country. The reports of the State Security Service of Georgia for 2016-2017 show the existence of possible supporters of

---

<sup>18</sup> Paul Goble, 2017.

<sup>19</sup> Kakha Putkaradze, Field materials of the expedition conducted in Pankisi gorge, 25-27.05.2019

terrorist organizations in Georgia and student groups<sup>20</sup> from foreign countries who were spreading terrorist ideology in the country.<sup>21</sup> As a result of the measures taken by the State Security Service of Georgia, in 2016, were identified 20 foreign citizens sponsoring terrorism<sup>22</sup>. "Terrorist organizations: Islamic State, al-Qaeda, Taliban considered a significant threat to the country's security."<sup>23</sup> In parallel with the fight of Georgian citizens in Syria, the report of the State Security Service of Georgia emphasizes the facts of the fighting of dozens of Georgian citizens in Syria and Iraq.<sup>24</sup> The government has taken effective measures to prevent their outflow from Georgia and to reduce the threat of terrorism. Those who posed a potential threat to the country's security were denied entry into county. steps were taken to control the financial assets of Islamic organizations, and an investigation was launched into Ayuf Borchashvili, a member of the Islamic State group, and members of his group (G. Kuprava, G. Khutunishvili and D. Firis). According to the decision of the Tbilisi City Court (March 7, 2016), Ayuf Borchashvili was sentenced to 14 years in prison, Giorgi Khutunishvili to 11 years, Davit Firisebia to 10 years and so on.<sup>25</sup>

In order to prevent the departure of Georgian citizens during hostilities, the Security Service took appropriate measures (using the method of "preventive talks"), exchanging information between the relevant agencies of the State security services and partner countries on persons belonging to and / or affiliated with the terrorist organization, as well as those in transit. Within the framework of this cooperation, the number of employees employed at the border control has increased (several hundred people). As part of counterterrorism measures, 1,286 people were detained at the Georgian border, and 1,014 were barred from entering Georgia. Based on the operative information, 40 cases of attempts of Georgian citizens to travel for the conflict zone were prevented.<sup>26"</sup>

Counterterrorism measures have significantly contributed to the improvement of the situation in the Pankisi Gorge, but the issues of their appointment to high-ranking positions in the Islamic State, their connection to Georgia and the developments process in the country need to be

---

<sup>20</sup> Report of the State Security Service of Georgia 01.01.2017-31.12.2017 / 14

<sup>21</sup> Report of the State Security Service of Georgia, 01.01.2016-31.12.2016 / 13

<sup>22</sup> Ibid

<sup>23</sup> Report of the State Security Service of Georgia, 01.08.2015 - 31.12.2015: 11

<sup>24</sup> Ibid

<sup>25</sup> Report of the State Security Service of Georgia, 01.08.2015 - 31.12.2015: 14

<sup>26</sup> Ibid

studied and analyzed. The story of Tarkhan Batirashvili, who left the Pankisi Gorge, the real reasons for the arrival of Ahmed Chataev (an one-handed Ahmed) in Georgia (the latter was not a Georgian citizen, although he was in Georgia for some time, had relatives with the Pankisi Kists) are of interest. Tankhan Batirashvili was a member of the Georgian Armed Forces for some time before leaving for Syria. He took part in the Russo-Chechen wars and the 2008 Russia-Georgia war. He was later dismissed from the Georgian Armed Forces and later charged with illegal carrying a weapon. After his release, Batirashvili became involved in the Syrian conflict, where he was appointed to a rather high position. After his dismissal from the Georgian Armed Forces, we consider it permissible that certain groups had carried out special measures to the Tarkhan Batirashvili, in order to transport him to the war zone and engage him in hostilities. The appointment of the Pankisi Kists to a high position in our view played a stimulating role for the youth to travel to Syria. In such a case, they could not only solve economic and social problems, but also hold a high position in the Islamic State. Open source does not record Tarkhan Batirashvili's public appeal to the youth of the gorge to participate in the global jihad, but his role as a high-ranking official has helped young people travel to the conflict region and strengthen Islamic fundamentalist ideology.

The story of Ahmed Chataev is different. The public learned about him after the counter-terrorist operation carried out in 2012 by the Georgian special services in the Lopota Gorge (near the Pankisi Gorge, near the Russian border). Georgian special services reportedly found an armed subversive group moving in the Lopota Gorge. Most of the members of the group were foreign nationals. Among them were 5 citizens of the Russian Federation and 3 citizens of Georgia. As a result of the special operation, the armed group was neutralized. Ahmed Chataev was initially sent by Georgian law enforcement to negotiate, but later chose to stay with the armed group. Chataev was arrested after the operation, but the court found him not guilty. Chataev left the country. His name is associated with the June 2016 terrorist attack at Ataturk International Airport in Turkey.

As part of the counterterrorism program, the State Security Service operatively identified individuals supporting Islamic State. They were arrested on the basis of operational expediency. Aysuf Borchashvili, a resident of Pankisi gorge, was among the detainees. It was after this that a video address of Ahmed Chataev appeared on the Internet. He demanded Borchashvili's immediate release, otherwise he threatened to carry out

a terrorist attack. Ahmed Chataev 2017. It turned out to be in Georgia in autumn. It is not ruled out that he was deceived by the Georgian special services. One member of Ahmed Ahmed Chataev's bodyguard was arrested in a counterterrorism operation on November 21, 2017, and the rest were liquidated. Chataev himself committed suicide. Later, people connected with Ahmed Chataev were arrested, one of whom, Temirlan Machalikashvili, was killed in bed at his home during a counterterrorism operation in Pankisi.

The analysis of open sources gives grounds to assume the main goals of Ahmed Chataev's visit to Georgia:

1. Arranging terrorist attacks on foreign diplomatic missions and facilities in Georgia;
2. Entering Georgia after the loss of territories by the Islamic Caliphate, wintering, conducting conspiratorial activities to expand the influence and ideology of the Islamic State, gathering like-minded people, conducting recruitment operations.

Ahmed Chataev's entry is connected with special events held in Pankisi in the following period. Temirlan Machalikashvili, who is connected with Ahmed Chataev, was wounded during the special operation. He later died at the hospital. It was suggested that the special force used excessive force and deliberately killed Temirlan Machalikashvili. Accordingly, the family members of the deceased and a certain part of the society demanded the punishment of the persons involved in the special operation, the disclosure of the identity of the special forces officer who directly carried out the shooting. To dispel the suspicions, the special services released video materials confirming Temirlan Machalikashvili's alleged connection to Ahmed Chataev's group. The State Security Service has set up an investigative team tasked with conducting special investigative actions to establish the truth. Chataev's case and subsequent events in Pankisi contributed to: A) Emergence of negative attitude towards state structures; B) Attempts to explain special operation by the political motivation; C) Radicalization of a certain part of the population of Pankisi Valley. The validity of these findings was also confirmed by our research in the Pankisi Valley. At one of the large-scale rallies in Tbilisi, Temirlan Machalishvili's father, Malkhaz Machalikashvili, said he and several others had sworn to blow themselves up in the State Security Service building, but out of love for Georgians, he reconsidered.<sup>27</sup>

---

<sup>27</sup> Internet newspaper ON.GE, Malkhaz Machalikashvili: I was going to blow myself up in SUS, I changed my mind because of the love of Georgians, May 31, 2018

2019 May 5, an audio conversation between Malkhaz Machalikashvili and one of the individuals was published. According to the State Security, the terrorist act of the First Deputy of the Security Service was averted. The audio recording spoke about the routes of the Deputy Head of the State Security Service, possible actions and the location of the terrorist act.<sup>28</sup>

The statements made by Malkhaz Machalikashvili and later by the State Security Service of Georgia presented the following types of problems and risks:

1. The possibility of carrying out a terrorist act against state agencies and government officials;
2. Stimulating radical views in the population of Pankisi gorge, especially among the youth;
3. Possibility of participation of third forces in the mentioned processes;
4. Ability to inspire certain processes.

Malkhaz Machalikashvili initially denied the authenticity of the audio recording and did not appear at the survey summoned to the security service. In case the authenticity of the audio recording was confirmed, the political forces and a part of the society demanded immediate appropriate measures. The authenticity of the conversation was confirmed, which was not denied by Machalikashvili himself. He appeared at the interrogation accompanied by a lawyer. Malkhaz Machalikashvili later confirmed the authenticity of the conversation published by the State Security Service of the Georgia. The case of Temirlan and Malkhaz Machalikashvili showed the problems in Pankisi gorge. A certain part of the local population distrusts the state structures. The case contributed to the emergence of radical and nihilistic attitudes among some of the youth of the valley, which was manifested in the demand for a customary trial of the persons involved in the special operation and the April 21, 2019. It was on this day that a protest was held against the construction of a hydroelectric power station in the valley, which turned into a physical confrontation with police units. 55 people were injured - 38 policemen and 17 civilians. The situation was settled after the arrival of the Minister of Interior in the valley. The authorities offered to send 3 elected representatives to the protesters to take part in the talks in Telavi. But before the talks could begin, the situation suddenly escalated. This

---

<sup>28</sup> Statement of the State Security Service of Georgia 07.05.2019, Available at: <https://ssg.gov.ge/en/news/479/saxelmtsifo-usaftrxoebis-samsaxuris-gancxadeba>

was followed by a physical confrontation. The artificial tension of the situation was facilitated by the use of various expressions and shouts (eg Allah-Akbar and others) by some of the protesters. In parallel with the situation in the Pankisi gorge, support rallies were held in Batumi and Tbilisi. Part of the non-governmental organizations questioned the legitimacy of the activities of the state structures. They supported the protesters and confirmed it with their signatures. The arrival of the Minister of Internal Affairs of Georgia in the gorge temporarily eased the difficult situation there, but negotiations were held. The construction of the hydroelectric power station was temporarily suspended. It was decided the necessity to thorough study of the statements made by state agencies.

Thus, the events of April once again confirmed the lack of communication between the government and the people of Pankisi, the distrust of the population towards the government structures. In order to regulate the processes and avoid further complications, it is necessary to study and analyze such issues in detail in advance.

### **Conclusion**

Thus, we discussed certain issues related to religious fundamentalism, radicalization and extremism in Georgia. We reviewed its historical, political, economic and social factors. As a result of the research, it was determined what factors contribute to the promotion of religious fundamentalism and radicalization in Georgia. In particular, the intensification of religious issues in Georgia is connected to the dissolution of the Soviet Union and the country's independence. The difficult socio-economic and political situation at that time facilitated the outflow of young people from the country to Muslim countries and the proliferation of Islamic schools in the region. Among many other circumstances, the named factor has led to an increase in the popularity of Islam among the population, a growing trend in the construction of Muslim shrines. The propaganda activities of foreign emissaries, the influx of illegal financial resources, and the coordinated actions of a certain number of young people returning from Islamic countries have exposed the attempt to politicize Islam in the region. It is associated with the low level of integration of young people returning from Muslim countries into Georgian society, with different, culturally-valued values. This circumstance contributed to the strengthening of religious fundamentalism, radicalization and extremism. Activities of some non-governmental organizations and illegal Mus-

lim schools are also contributing factors to the radicalization.<sup>29</sup> Attempts to politicize Islam are a dangerous tendency to expand the influence of Islamic countries and organizations. The analysis of events revealed the socio-economic situation, the activities of illegal Islamic schools, and the activities of foreign emissaries on the spread of Wahhabism. The security interests of the country put on the agenda the need to study the reasons for the emergence and spread of radical Islamic ideology in the region and to weaken ties with individual Muslim states and organizations. As a result of the research, it was found that the process of radicalization in Georgia is in full agreement with the definition in the international scientific community about the existence of radicalization in society. According to the above, the existence of a radicalization of the population must meet four main components:

1. „Existence of a negative attitude towards certain political, religious, ethnic groups, as well as political, religious, economic and social processes in the society or its separate group;
2. Ideological influence or an obvious attempt to influence;
3. A group artificially or arbitrarily created in the society, which systematically carries out formal and informal meetings, teaching and distribution process, ideological influence, proper financing of a specific process and / or group;
4. The current situation in the country and environment-information space.”<sup>30</sup>

As a result of the research, it was analyzed how realistic is the talk about the real threat of fundamentalism in Georgia? Is the named issue in the interests of either party? By activating religious issues, is there an attempt to cover up strategic interests by hostile stakeholders / organizations / states? By analyzing the above issue, we tried to show that it is not right to talk about the threat of fundamentalism at this stage. However, there is an attempt to artificially stir up radical and nationalist views in some parts of the Christian and Islamic population of Georgian. The facts presented by us prove that in the hands of any interested party, religion is a real opportunity to organize political, economic, cultural, military interests and the spread of influence. Consequently, all this increases the possibility of trying to influence the Christian and Islamic communities.

---

<sup>29</sup> Abesalom Aslanidze, *Causes of Youth Radicalization in Georgia and Ways to Solve It*, 2018: 86/88, *Balavari of Our Spirituality*, X, ISSN 1987-5916.

<sup>30</sup> Hafez, Mohammed, 2015, pp. 961-970.



The study found that the Pankisi crisis is one of the most vulnerable areas in Georgia's recent history. The spread of fundamentalist (Salafism / Wahhabism) Islam, which began in 1992, has created serious problems in the region. This was accompanied by ongoing hostilities in the North Caucasus. A large influx of refugees entered Georgia from the North Caucasus. Georgia, which is in an extremely difficult economic situation, has not been able to provide refugees with appropriate social conditions. Added to these difficulties were statements made by a neighboring state about the existence of terrorists in the valley. The damaging effects of this situation for Georgia can be presented in the following points:

1. The growing trend of fundamentalist Islam in the Caucasus, as well as in the Pankisi Gorge, and their support with large financial resources;
2. Deterioration of the criminal situation with a detrimental effect on the image of the state after the entry of refugees, kidnapping of people (including foreign businessmen);
3. Heterogeneous (mostly negative) attitudes of the population towards refugees (due to their involvement in the Abkhaz conflict) as a precondition for possible ethnic confrontation;
4. Existence of representatives of arms and drugs trade, as well as representatives of foreign special services in the gorge. At the same time, there was a growing interest in Pankisi from the different countries, which made it necessary to take appropriate operational measures.

Analysis of the available information allows us to conclude that in the gorge in 1992-2004 developments with their damaging effects, posing direct threat to the national security of the country, were present. Many of the problems were related to the lack of sufficient financial resources. State structures were underfunded, which in our opinion has led to the involvement of a small but certain part of the state government in processes that were detrimental to the country. This factor has contributed to the deterioration of the criminogenic situation in the gorge and the aggravation of distrust in the state structures in the society. The intensification of the Islamic State and additional problems for Georgia were added to the difficult social background. Part of the citizens of Georgia became involved in the Syrian conflict, which put on the agenda the need to study the relevant reasons. Based on the analysis of the situation, it became possible to carry out special measures, identify individuals and organizations supporting Islamic State, and study the activities of citizens of Georgia and abroad. The actions taken at that stage ensured

the prevention of the departure of Georgian citizens to the conflict zone. Analyzing the current situation and the materials we have obtained in the Pankisi Valley allow us to link the outflow of young people from the valley to economic factors and the prospect of being promoted to high position in the conflict region. The appointment of Tarnkhan Batirashvili, a resident of the gorge, as the Minister of War of the Islamic State acted as a kind of stimulator. Travel to the conflict region, according to young people, would help them to improve their economic and social situation. In our conclusion, the factor of resentment and distrust in the government played a significant role in this case, which was skillfully used by the interested states or organizations to recruit them.

Another important regularity emerges. Islamic State has made every effort to attract young people to carry out terrorist acts and take part in hostilities. They sent their representatives to the target countries to recruit this category of people. According to our conclusion, Ahmed Chataev must have entered Georgia for this purpose, however, the suspicions raised by the Georgian special services about his deception are not groundless. In particular, he may have been deceived by the Georgian special services in the framework of international cooperation from the territories of the Islamic State to take special measures against him. One of the sources of problems in the Pankisi Gorge is the low level of public confidence in the government. The reason for this, in our opinion, should be the delayed communication with the population and the timely failure to answer the questions. The tragic story about Temirlan Machalikashvili strengthened this mood.

Analysis of events and field materials conducted in the population allows us to conclude:

1. The degree of distrust towards the Georgian government is stimulated in the gorge, which raises the mood of applying the norms of customary law in a certain part of the population. Their request is also relevant: the persons participating in the special operation were educated according to the norms of customary law;

2. The interest of the youth of the valley in radical Islam - "Wahhabism" is quite high;

3. The negative attitude of the elders of the valley towards radical Islam is quite high;

4. The desire of the elders of the gorge to assist the state structures in conducting the investigation and to establish in time the objective truth about the criminal cases have happened in the gorge;

5. The attitude of the elders of the gorge towards the public statements made by the Machalikashvili family is negative, however, they oppose his criminal responsibility and, in case of arrest, express their readiness to hold protest rallies;

6. The attitude of establishing order and settling the situation in Pankisi, together with the desire for a peaceful life, is conditioned by the fear of the possible interest of the Russian Federation in the processes taking place in the gorge.

Despite the published audio recording, the authorities were unable to detain Malkhaz Machalikashvili, the caution of the government is conditioned by the desire to avoid inspiring possible provocations. Which may be used by the special services of individual countries. The events that took place in the village of Birkiani in the Pankisi Valley on April 21, 2019, the materials published on the Internet, the statements of non-governmental organizations or individuals create the possibility of artificially managing the processes. No further escalation of the situation is ruled out. The location of the border with the Russian Federation, the possibility of further spread of Salafism in the gorge and other factors may continue to be detrimental to Georgia (worsening of the criminogenic situation, re-accusing Georgia of promoting terrorism, inciting ethnic strife between Georgians and Kists) and exporting Salafism.

### **Bibliography:**

**Walter Laqueur. 1996.** 'Postmodern Terrorism', *Foreign Affairs* 75 (September-October 1996), pp. 24-36.

**Walter Laqueur. 1999.** *The New Terrorism: Fanaticism and the Arms of Mass Destruction* (New York: Oxford University Press).

**Jeff Haynes. 1995.** United Nations Research Institute for Social Development, *Religion, Fundamentalism and Ethnicity A Global Perspective*, pp. 5, May 1995

**Bongar, Bruce. 2007.** "The Psychology of Terrorism: Defining the Need and Describing the Goals", *Psychology of Terrorism.*" Bongar, Bruce, ed. *Psychology of Terrorism.* Oxford: Oxford University Press.

**Neumann, Peter. 2008.** "Introduction." Neumann, Peter, ed. *Perspectives on Radicalization and Political Violence.* London: International Centre for the Study of Radicalization and Political Violence.

Asta Maskaliūnaitė\*, *Exploring the Theories of Radicalization*, *International Studies Interdisciplinary Political And Cultural Journal*, Vol. 17, No. 1/2015.

**Nino Chikovani. 2012.** "Religion and Culture in the South Caucasus", *Social Science Series*, p. 45.

Interview with Tariel Nakaidze, head of the Georgian Muslim Union - Kakha Putkaradze, September 12, 2017, Batumi.

Islam - religion or weapons in the hands of extremists? Bulletin of the Foreign Policy Research and Analysis Center of the Ministry of Foreign Affairs of Georgia, # 4, Tbilisi, 1998, p.3

Crossroads and Conflict. Security and Foreign Policy in the Caucasus and Central Asia. Ed.by Gary K.Bertsch, Cassady Craft, Scott F.Jones, and Michael Beck. Routledge, New York-London, 2000, p. 8.

**Kakha Mchedlidze. 2003.** Is There a Threat of Islamic Fundamentalism in Georgia, July 18, 2003, <https://www.radiotavisupleba.ge/a/1529680.html>;

**Dieter Senghaas. 2002.** The Clash within Civilizations (Coming to terms with cultural conflicts). Routledge. London-N.Y., p. 74.

**Дугин А. 1999.** Основы геополитики. Геополитическое будущее России. М., с. 213. [Dugin A. Osnovy geopolitiki. Geopoliticheskoye budushcheye Rossii].

**Matsaberidze M. 2003.** Georgia and the "Geopolitics of Orthodoxy". - Scientist of Georgia. Acad. Yearbook of the Institute of Political Science - 2003. Tbilisi, p. 6.

**Paul Goble. 2019.** Orthodoxy Doesn't Define Russian Identity or Russian Attitudes toward Ukraine, Melnikov Says, January 26, 2019, Available at: [https://windowoneurasia2.blogspot.com/2019/01/orthodoxy-doesnt-define-russian.html?fbclid=IwAR0vNiH89Ah4eAmq3TOJFgboa6VWVfQYOWwbvz5xvl0ryz2\\_MHAXznIvZknI](https://windowoneurasia2.blogspot.com/2019/01/orthodoxy-doesnt-define-russian.html?fbclid=IwAR0vNiH89Ah4eAmq3TOJFgboa6VWVfQYOWwbvz5xvl0ryz2_MHAXznIvZknI)

**Paul Goble. 2017.** Jamestown Foundation, Orthodox Fundamentalists Backed by Russian Siloviki, Scholar Says, 10 October 2017, Eurasia Daily Monitor Volume: 14 Issue: 126, available at: <https://www.refworld.org/docid/59e5da034.html> [accessed 26 October 2019]

**Abesalom Aslanidze. 2018.** Causes of Youth Radicalization in Georgia and Ways to Solve It, 2018: 86/88, Balavari of Our Spirituality, X, ISSN 1987-5916.

**Hafez, Mohammed. 2015.** The radicalization puzzle: a theoretical synthesis of empirical approaches to homegrown extremism, Studies in Conflict and Terrorism, v. 38, 2015, pp. 961-970. Available at: <http://hdl.handle.net/10945/47758>

Kakha Putkaradze, Field materials of the expedition conducted in Pankisi gorge, 25-27.05.2019.

Report of the State Security Service of Georgia 01.01.2017-31.12.2017 / 14

Report of the State Security Service of Georgia, 01.01.2016-31.12.2016 / 13

Report of the State Security Service of Georgia, 01.08.2015 - 31.12.2015: 11

Internet newspaper ON.GE, Malkhaz Machalikashvili: I was going to blow myself up in SUS, I changed my mind because of the love of Georgians, May 31, 2018

Statement of the State Security Service of Georgia 07.05.2019, Available at: <https://ssg.gov.ge/en/news/479/saxelmtsifo-usaftrxoebis-samsaxuris-gancxadeba>

*Vjollca Dibra Ibrahim*  
*University of Gjakova (Kosovo)*  
[vjollca.dibra@uni-gjk.org]

*Sejdi Sejdiu*  
*University of Prizren (Kosovo)*  
[sejdi.sejdiu@uni-prizren.com]

## Contemporary Albanian Literature in Kosovo (Now and Here)

**Abstract:** *Albanian literature written from the 1940s to the present day can be called contemporary Albanian literature, or in other words, World Literature after the Second World War. The allowed literature was the only method of socialist realism, which was ideologized and politicized, i.e. subject to communist ideology and politics. It was not free literature, but entirely engaged in the service of socialism and communism. The method of socialist realism had some very narrow and binding criteria for all those who thought of publishing their works. Such were the communist members, the positive hero and the struggle against foreign middle-class influences. In such a situation, we can say that it was purely subject to ideology and communist politics. Due to its very narrow scheme, most of the literary work written during this period had its own value and function during the period of the communist system. This type of literature form some writers was accepted with conviction, while others were used to compromise to publish their works. Although under very strict censure, many important works were published which could have been contrary to socialist realism. Such works were with an indirect expression or with a subtext, often in symbolic and allegorical forms. These works consist of some of the greatest values of contemporary Albanian literature, the first and the foremost authors of this kind of literature, their best works, publishers, and their echoes in the language of translation.*

**Key words:** *Literature writer; history; prose; poetry; drama; contemporary; education; publisher; World War II.*

### A panoramic presentation

Contemporary Albanian literature begins, according to scholars of the history of this literature, in the second half of the 20th century, precisely in the year when the weapons were silenced all over the world and the war stopped in all the Albanian lands that were occupied by various

occupiers. Immediately after the war, freedom of the country reflected, *inter alia*, with the freedom of Albanian writers and literature, with the publication of some works and books by young writers who for the first time began to be discussed more than those of the preceding literature called modern Albanian literature, which had few authors and few works, but these authors and works had been echoed because of the new themes they dealt with and their writing technique. Efforts on presenting and assigning a date to these literary works have been made by Qosja<sup>1</sup>, Rugova<sup>2</sup>, Hamiti<sup>3</sup>, Elsie<sup>4</sup>, Bihiku<sup>5</sup> and few others. The same ones, being aware that literature and history are not unchangeable and sustainable, have left the most official duty of writing historical literary texts on the hands of the scientific institutions, which they have significantly helped a lot through the presentation of data with authors and publications of their works and books.

Following the first steps of contemporary Albanian literature and comparing it with contemporary national literature of other countries, this comes and occurs with us many years after them and develops much slower than it had developed in European countries for reasons, among other things, that they who began to write and publish from 1945 onward did not bring any creative feature from foreign writers of contemporary literature, and then they did not have extensive knowledge of contemporary foreign literature which had started in many countries half a century ago. However, despite this slow-moving literary movement, several generations that were extremely well received by the readers, but not by political systems, came to light in Kosovo.

Literature created in Kosovo was subject to Serbian censorship, which often elaborated metaphorical, symbolic and allegorical forms. This important and qualitative creativity, until 1990, for political reasons, was unfortunately seen separately from the literature written in Albania. It has been published in Tirana through an ideological selection, so it is still not well known in Albania. Also, the literature of the diaspora, because it was dissident and anti-communist, was not allowed to circulate in the Albanian space at all. There were writers and artists convicted for reasons directly related to their work. Among them, there were talented

---

<sup>1</sup> Qosja, Rexhep, 1979.

<sup>2</sup> Rugova, Ibrahim, 1986.

<sup>3</sup> Hamiti, Sabri, 2002.

<sup>4</sup> Elsie, Robert, 1997.

<sup>5</sup> Bihiku, Koço, 1978.

creators, who in their work had violated Article 55 of the constitution, in the form of agitation and propaganda. Among the representatives of this category can be mentioned "Gjarperinjte e gjakut" (*Blood Snakes*)<sup>6</sup> of the now late writer, Adem Demaçi, which circulated a few months in the hands of the readers freely, but for the next twenty years it was spread around from hand to hand illegally because, if someone was found keeping it at home or somewhere else, that person would have been sentenced by Serbian authorities same as for illegal possession of weapons like its author who was convicted for opposing the communist system, with 28 years of imprisonment. Meanwhile, the Vuthjan writer from Montenegro, Rexhep Qosja, who had finished literature studies in Kosovo and started working in this country, had to write the first fragments of his own works on the subject of the Yugoslav severe communist regime under the pseudonym Luan Dukagjini in the literary magazine *New Life*, in order to be settled here comfortably and sleep calmly. These individual cases and others as well are recorded in some magazines, newspapers and other media, but not in any official texts prepared for publication by any Albanian academy or institute.

Therefore, having knowledge of the setting of contemporary Albanian literature, we have set a limitation starting with the title: *now* and *here*. These two adverbs have shortened both the scope of the research and of the writing. So, apart from the time, which should not take on the early beginnings of contemporary literature, those after the Second World War, we have narrowed the space: *here* (in Kosovo).

By gathering Albanian writers of contemporary literature together, since its beginning in 1945 until today, we consider that contemporary Albanian literature has reached its 73 years of life, while the number of Albanian writers of this period has already reached over 730. (The number can be even higher if we ask for an identification of Albanian writers who live outside their home country). "Over the years, these writers and this literature" have transformed themselves, a phenomenon understandable for a new literature that, in most cases, has been developed under the influence of thematic and stylistic innovations brought by generations of creators like subjective factor, as well as under the influence of the historical, social and cultural context, as an objective factor"<sup>7</sup>. And, as it is called thus, contemporary Albanian literature, it is written, developed and published by Albanian writers living in Albania, Kosovo, Macedonia,

---

<sup>6</sup> Demaçi, Adem, 1955.

<sup>7</sup> Qosja, Rexhep, 1979, p. 217.

Montenegro and everywhere else in a country and other places in the world where an Albanian writer writes and publishes in Albanian language, even when that writer takes as a basis a foreign writing model or writes by being motivated from the works of world's great writers.

We do not have exact data regarding the number of contemporary Albanian writers out of Kosovo in these years. We said above that it is over 730. Of course it gets even greater if we calculate that contemporary is that work and that book and that writer who coincides with the time he writes and lives. And, after the research we did on the four websites of national libraries in Kosovo, Albania, Macedonia and Montenegro, in which most books of those authors are equipped with the international book number (ISBN) and with a general classification, we took statistical notes regarding how many writers the Albanian literature has today. From 1945 until now, we have identified over 900 writers of essays, stories, novels, poetry, criticism, drama, studies, and other literary types. We are talking only about those authors who have published books and who have deposited obligatory specimens, according to the Law on Libraries and on the basis of the Law on Publishing Activity and Books, in the libraries where they handed over the manuscripts so that their books got equipped with an ISBN.

When mentioning this number of authors, we should bear in mind that contemporary literature includes different genres of creation and study. For Albanian authors who write and study this literature we do not have full bibliographies. Some have been published, but not a bibliography of the Albanian book since its beginnings, at least from 1945 until now, which we are also interested for in this text. This work, for twenty years of efforts and research in regional archives and national libraries, is being intended to be brought to light by the National Library of Kosovo "Pjetër Bogdani", its employees and its affiliates, but the project "The bibliography of the Albanian book" launched since 2000 has not been published yet, where we could have a general presentation of Albanian writers within the major ethnic Albanian states, but also abroad. Until this bibliography is published, we will try to do our job, conduct research on Albanian books, for authors of contemporary Albanian literature elsewhere, especially here in Kosovo, Macedonia, Albania and Montenegro, which we have taken as the object of perspective and analysis, in order to introduce our writers to foreign readers.

It should be made clear that the title of this literature, in the program of the Faculties of Philology/Departments of Albanian and Literature Language all over the Kosovo as there are at University of Prishtina,



University of Gjilan, University of Peja, University of Gjakova and University of Prizren, is also found as Contemporary Albanian Literature. These titles, Contemporary Albanian Literature or Albanian Literature today, can also be encountered in some programs of the Faculty of Education at the University of Prishtina and in some of the universities mentioned above regardless whether this course is obligatory or elective for students.

These two names for this literature as well as *Modern Albanian Literature (rarely)* can also be found as study subjects at AAB College, Faculty of Arts, and in some study programs at other private colleges (in FAMA, in "Globus", etc.), where it can be learned about Albanian literature after 1945. But these names, for those who do not know, are quite different. They are different, but we have seen that the professors of literary science do not distinguish them. We have seen the subject programs of professors who conduct lectures on the same works of the same authors of contemporary Albanian literature in the same subject they call *Modern Albanian Literature* or, consequently, *Current Literature* (such a subject is being lectured at the department of Albanian Literature of the Faculty of Philology of the University of Prishtina).

What can we say and what else should we say about this presentation of contemporary Albanian literature?

Considering the expansion on time, space and number of authors and works, if we make a comparative analysis between the periods of Albanian literature, it results that this is the greatest and brightest period in the history of Albanian literature, which has become well known and is highly appreciated even outside the national borders. Some of the works of its authors even permeate to 40 or more languages of the world thanks to the translation of their works (such as the case of I. Kadare). With regards to this literature and the authors of this period, and with personal inclinations and opinions some scholars and critics from Albania, Kosovo and Macedonia have written and published some books on contemporary Albanian literature, as authors or co-authors. For example, in Kosovo, the scholar Sabri Hamiti, in his compilation of his literary work, in the ninth and tenth volumes consisting of hundreds of pages, has included contemporary Albanian literature, making selections of authors and their works for interpretation and analysis. In the ninth volume<sup>8</sup> S. Hamiti included the works of Esad Mekuli, Rexhep Qosja, Azem Shkreli, Fahredin Gunga, Rrahman Dedaj, Ali Podrimja, Mirko Gashi,

---

<sup>8</sup> Hamiti, Sabri, 2002.

Vehbi Kikaj, Teki Dervishi, Musa Ramadani, Jusuf Gërvalla, Eqrem Basha, Zejnullah Rrahmani, Nexhat Halimi, Edi Shukriu, Rexhep Elmazi, Agim Spahiu, Arif Demolli, Mehmet Kraja, Rexhep Ismaili and Ibrahim Rugova. Meanwhile, in the tenth volume<sup>9</sup> he selects and analyzes the works of Hivzi Sulejmani, Nazmi Rrahmani, Bilall Xhaferi and Anton Pashku, only of these four authors whose works he widely interpreted, and some of which, until he retired from the Faculty of Philology, where he had taught for about 50 years, he had also introduced into the syllabi of the subjects he had lectured and he had also engaged assistants for the part of his practice classes.

Books on critics and study of contemporary Albanian literature, on the works of poetry and prose, have been written and published by some authors as parts of their school assignments (master and doctoral theses) and for some others for academic promotions such as: Raifi<sup>10</sup>, Vinca<sup>11</sup>, Radogoshi<sup>12</sup>, Elsie<sup>13</sup>, Aliu<sup>14</sup>, Islami<sup>15</sup>, Kuçuku<sup>16</sup>, Rrahmani<sup>17</sup>, Sadiku<sup>18</sup>, Shema<sup>19</sup> and some 100 others, some before and some after them.

Further, the trends of contemporary Albanian literature have been followed by the Academy of Arts and Sciences of Kosovo. Several years ago, this same institution had organized a scientific roundtable with the topic on *The course of Contemporary Albanian literature since the second half of the twentieth century: poetry, prose and drama*, and the material of this conference, the speeches of dozens of presenters from Kosovo and Albania have been summarized in a publication consisting of hundreds of pages and was put for sale on the market.

A presentation of authors and works of contemporary Albanian literature has been done by the scholar Arben Prendi<sup>20</sup> in a monograph. The author continues this same study activity with the publication of another study book<sup>21</sup>. In addition to presenting contemporary Albanian authors in

<sup>9</sup> Ibidem 2002.

<sup>10</sup> Raifi, Mensur, 1977.

<sup>11</sup> Vinca, Agim, 1985.

<sup>12</sup> Radogoshi, Kadrush, 1985.

<sup>13</sup> Elsie, Robert, 1995.

<sup>14</sup> Aliu, Ali et al., 2002.

<sup>15</sup> Islami, Nebi, 2003.

<sup>16</sup> Kuçuku, Bashkim et al., 2004.

<sup>17</sup> Rrahmani, Kujtim et al., 2006.

<sup>18</sup> Sadiku, Sinan, 2013.

<sup>19</sup> Shema, Isak, 2015.

<sup>20</sup> Prendi, Arben, 2015.

<sup>21</sup> Prendi, Arben, 2017.

university, school, and study textbooks, dozens of anthologies of contemporary Albanian poetry have been compiled. One was designed individually by the researcher of the structure of Albanian poetry development, Agim Vinca.<sup>22</sup> Another was compiled, also individually, by the scholar Bashkim Kuçuku. The same author has compiled a similar one in co-authorship with Basri Çapriqi, Sadik Bejko, Sali Bashota.<sup>23</sup> An anthology of contemporary Albanian poetry has also been compiled by Ibrahim Rugova. A small one has also been designed by Irhan Jubica. Even some other curious men and women across the Albanian borders have conducted this sort of selection and summary work. But none of these anthologies has been translated into another language. They have remained for internal use only - for Albanian speakers.

An important contribution to the presentation of Albanian history and literature in the world, especially Albanian contemporary literature, has been given by the International Seminar on Albanian Language, Literature and Culture, which has been organized since 1976 and continues to be held even today, every year in August, at the Faculty of Philology in Prishtina. Through the cooperation and participation of many scholars from different countries of the world and the confrontation of ideas and obtaining and providing their own information about the literature of their country and about the most renowned works by their contemporary authors, our scholars and foreign ones present papers with the key topic on the creativity of a contemporary Albanian writer or on one of his/her works only. The materials of this seminar, of its 37 editions, are published on this website link <https://filologjia.uni-pr.edu/Seminari.aspx>. As we can see, older materials have been digitalized, and the newest ones are in PDF format and can be read, copied and used for quotation as the first one.

Good literature is developed through criticism, but bad literature is also assigned its boundaries and the territory of movement through criticism. This seminar, which is organized in cooperation with the professors of the Faculty of Philology of the University of Prishtina and of the Faculty of History and Philology of the University of Tirana, has internationalized, more than any other seminar, the Albanian language, culture and literature of all periods, because through the participation of scholars from different countries in this seminar, Albanian literature, especially contemporary, has penetrated into their countries through the translation

---

<sup>22</sup> Vinca, Agim, 2005.

<sup>23</sup> Kuçuku, Bashkim et al., 2015.

of the works proposed by the seminar participants. Thus, like this seminar, the Kosovo Writers' Association, as well as the Association of Kosovo Publishers should have contributed to Albanian literature with presentations abroad. They do not do this because they do not know how to do it.

### **Contemporary Albanian literature, authors, editions and publishers**

#### ***The case of Kosovo***

We are commencing this presentation of contemporary Albanian authors and literature from Kosovo, and then give a summary of its situation today. Contemporary Albanian literature of Kosovo begins shortly after 1945, and undergoes a major development with the establishment of *The New Life* literary magazine in 1949, in which authors of Kosovo began to publish poems, stories, drama, criticism, essays, part of research studies series distributed in many magazine numbers. This means of communication among writers and their presentation was started by the Albanian poet from Montenegro, Esad Mekuli, with some close associates, whose taste and appreciation he trusted very much. So, many writers began to publish in this magazine, writers from Kosovo, adult's and children's, such as Adem Demaçi, Qamil Batalli, Muharrem Qena, Abdullah Konushevci, Ali Podrimja, Azem Shkreli, Ymer Shkreli, Enver Gjergjeku, Din Mehmeti, Fahredin Gunga, Azem Shkreli, Hivzi Sulejmani, Sinan Hasani, Rexhai Surroi, Jakup Ceraja, Ramiz Kelmendi, Jusuf Gërvalla, Mirko Gashi, Flora Brovina, Sabit Idrizi, Anton Pashko, Sabri Hamiti, Teki Dervishi, Bajram Krasniqi, Sefedin Fetiu, Ekrem Kryeziu, Sali Bashota, Zejnullah Rrahmani, Agim Deva, Arif Demolli, Rrahman Dedja, Nazmi Rrahmani, Zejnullah Halili, Ymer Elshani, Anton Berisha, Ibrahim Berisha, and many others, some of them published poems, some of them stories, reviews, fragment from long literary studies, rarely a drama, playwrights Ekrem Kryeziu and Fadil Hysaj, who were university professors and who wrote drama for performances in the theatre, but not to be read by the public outside the theatre, whose works expressed artistically the tragic drama of their own people. Also, the editor-in-chief, Esad Mekuli, then Rexhep Qosja, Basri Çapriqi, Tajar Hatipi, Josip Relaj, Abdylaziz Islami, Bedri Dedja, Hasan Mekuli and many others published their works in this magazine. Some of the texts of these authors that were published in this magazine several months and years later were published by the Publishing House *Rilindja* as separate books, being subject to the editorial criteria of this editorial office, which paid

great importance to the use of the Albanian language, following the 1972 Constitution of the Language of the Congress of Orthography.

Hence, Kosovo's contemporary Albanian literature was slightly published by the Text Publishing Authority of the Socialist Autonomous Province of Kosovo, and then slightly more by the same Authority with a shortened name known as Authority for the Publication of Text-books. Especially *Rilindja* Publishing Company but also *Mustafa Bakija* have brought to light thousands of books, hundreds of Albanian authors and dozens of Kosovar authors. Since there were no other state publishing houses in Kosovo, the greatest burden of publishing works and books of writers and literary scholars had fallen upon these houses, which increased each day after the inauguration of the University of Prishtina - the Faculty of Philosophy, then that of Philology as a separate one from the Faculty of Philosophy. Prior to depositing the manuscript in this enterprise, writers were stimulated by daily newspapers with money, where occasionally, especially on Saturdays, various literary genres were published in their cultural appendices mainly by Kosovo authors and authors were given extra fees, which at that time, 40 years ago, was a pretty good payment.

The editorial office *Rilindja* published the first works by these writers from Kosovo: Esat Mekuli, Ramiz Kelmendi, Azem Shkrel, Sabri Hamiti, Rexhep Qosja, Agim Vina, Teki Dervishi, Musa Ramadani, Milazim Krasniqi, Adem Gashi, Sali Bashota, Din Mehmeti, Ali Podrimja, Ibrahim Berisha and many others, as well as many manuscripts of many authors, this editorial office either edited or returned, and sometimes even changed them (as the writer Musa Ramadani complained about the changes made to one of his work, others complained about racial issues between peers and professions of the same type).

The Publishing House *Rilindja*, which published the *Rilindja* newspaper, in this newspaper, more than once a year announced the competition for the publication of manuscripts of study books, essays and literary works. The *Rilindja* newspaper also announced a poetry and stories competition for the first, second and third place, and the award-winning ones were published in the newspaper while the authors were rewarded with extra fees.

Those scholars who were oriented to become faculty professors used to publish in the newspaper *Rilindja*, *Bujku*, *Zeri i rinise* (*The Voice of Youth*), and also even those who had decided to become writers, just to write for themselves and for the readers. Those who became university professors decelerated a bit their literary and study production, while

those who wrote without being charged with duties at the faculty for students continued their writing. We support this fact with the following statistics: about 30 percent of the professors of the Faculty of Philology of the University of Prishtina, besides the Master's and Doctoral Studies, did not publish another book; 30 percent of others, besides these two works, have also published two or three books, mostly poetry, while the other 40 percent have published over ten literary and critical / study books.

Among the writers who became famous without being faculty professors are: Azem Shkreli, Din Mehmeti, Ali Podrimja, Adem Gashi, who are well known in Kosovo and all over Albania, and have also penetrated into foreign literature through translations into other languages of some of their early and late works. The same ones have been awarded with prizes by state cultural institutions, and one of them (such as Adem Gashi) has received 40 literary awards from institutions, organizations, clubs, fairs and cultural festivals that have been organized over the years in Kosovo and Albania.

After the commencement and the end of the war in Kosovo (1997-1999), the *Rilindja* Publishing House, although not subject to great destruction, was not restored anymore. The publishing activity was started by private publishers, first *Buzuku*, then *Rozafa*, *Kosovafilm*, *Faik Konica* and many others. So today, according to the data of the Business Registration Agency, in Kosovo, this kind of publishing activity is developed by 320 individual and social businesses. Most of them have only one employee, the one who has founded the business and have a very small turnover, about 2000-3000 euros per year. Meanwhile, according to the records of printing companies *Lena Grafik*, *Rotoprint*, *Grafoprint*, *Europrint*, *Blendi*, *Printingpress*, they rarely publish a 500 and 1,000-copy book offered by publishing houses for publishing. They often publish 200-300 copies of a book title. In addition to this information, we have also been obtained data on the number of Albanian book publications at the National Library of Kosovo "*Pjetër Bogdani*", which equips the books with ISBN and classifies them. And, according to the leaders of this institution, for journalistic, scholarly, prose, poetry, scholarly, and dramatic books, within a year, they issue over 500 ISBNs for publishers of Albanian authors. The level of these publications leaves space for improvement. There are flaws in layout, design, content, and writing culture.

### **The status of contemporary Albanian literature in social life and in the education system**

Due to unstable political circumstances in the Albanian lands for years, it is not easy nor possible to speak adequately and convincingly about writers of the contemporary Albanian literature, especially of the first ones, some of which had become “royal writers”, but after leaving Albania and Kosovo, but also Macedonia and Montenegro because of the violent measures of the communist system, their works came under censure. However, if not of their authors, we can talk about good or bad works, which have resisted time, but some of which time has “consumed”. This period of literature, its writers and their works, did not have the same life and work in the educational system of any place where it is spoken and thought in Albanian. Although they were included in the textbooks, some Albanian writers of late ‘80s in Kosovo were removed from the textbooks of primary and secondary school, and were replaced with other writers, who were more befitting the Yugoslavian communist system.

In this context, we should mention that from 1945 to 1997 school textbooks, those of the primary and secondary school, were changed for at least fifteen times. Many Albanian writers, many poems and prose fragments were removed and replaced with works of Serbian and Montenegrin writers. Such changes in these texts were done allegedly since “programs have been completed with new contents, which are an expression of contemporary movements in our society and for our students to develop awareness for the necessity of strengthening and permanently and continuously making independent the brotherhood, and to contribute even more to the development of patriotism and Yugoslavian internalization”.<sup>24</sup>

Completions, changes, and corrections in the text programs of the lower and secondary level were done in the 1944-’45, ’60, ’62, ’64, ’70, ’71, ’74, ’77, ’80, ’82, ’85, ’89, ’90, ’92-’93, ’96-’97. (See for more details Ragip Gjoshi, *Mësimdhënia e gjuhës shqipe në Kosovë: aspekte historike dhe didaktike*), Prishtina, 2017). The works of authors for children and adults, such as Mark Krasniqi, Rexhep Hoxha, Agim Deva, Esad Mekuli, Rifat Kukaj, Bedri Dedja, Abdylazis Islami, were sometimes removed from, sometimes returned in textbooks and reading materials of the lower level, who were not part of learning programs anymore in the ‘90s, whereas Nazmi Rrahmani, Hivzi Sulejmani, Rexhep Qosja, Enver

---

<sup>24</sup> Gjoshi, Ragip, 2017, p. 238.

Gjergjeku, and others who did not “caress” the authorities were also omitted from the reading materials in secondary schools at the same period. The first Albanian authors of childrens’ literature and the secondary ones of adults’ literature were replaced with the texts of such authors as Ivo Andrić, Dušan Radović, Nikolla Košić, Dane Oblak, Sinan Hasani, Sllavko Vukosavljević, Video Podgorec, Miroslav Antić. The circulation of these textbooks were huge, 20000 to 50000 copies, and they were published by the Entity of Texts and Learning Tools of the Socialist Autonomous Province of Kosovo.

Indeed, some Albanian writers were even forbidden to be read for the topics they had dealt with in their works (we mentioned the case of Demaçi’s work). So, the destiny of the literary work was closely tied to the destiny of the writer, who would also suffer because of its publication. This social status in the education system in Albanian was the luck of some writers of different periods in the history of literature.

Today the situation is completely different. The communist system has fallen, and a nation and culture oppressed for a long time flourished as soon as the Republic of Kosovo became an independent country, and textbooks, authors and texts of contemporary literature for presentation and studying are chosen by the reviews of the Ministry of Education, Science, and Technology (MEST) of the Republic of Kosovo. Primary and secondary school textbooks are chosen by the review board charged by the MEST to select texts that are offered by groups of authors for these study levels. Therefore, since the after-war, in the social sciences program, natural sciences, mathematics and information technology, MEST<sup>25</sup> has planned 4 hours per week, 132 hours per week from the course of Albanian language and literature. On the other hand, the program of philology have 5 hours per week, 165 hours in a year from this course. In the course of contemporary literature, students learn about the poetry of Esat Mekuli, the stories of Anton Pashku, the poetry of Dritëro Agolli, the novels of Ismail Kadare, the novels of Kasëm Trebeshina, the poetry of Ali Podrimja and Azem Shkreli. This presentation of these authors is two short in number of authors and works of the Albanian contemporary literature.

---

<sup>25</sup> See this document: <https://masht.rks-gov.net/uploads/2015/05/klasa-12-001-a-gjuhe-shqipe.pdf>



### **Contemporary literature and Albanian contemporary literature, translations**

Literatures, be they far or near, communicate and coexist, just as people do, with one another, and give each other culture and ideas. This social rapport and acquaintance is enabled through translation from one language into another of a literary work. Whether we want to or not, whether we like to admit it or not, Albanian contemporary literature has broken through national boundaries not as much as it was written. However, after the end of Second World War up to now, various literatures have arrived in our lands, works of the best Nobel prize winners of literature, mainly from publishers from Albania through translation from English, French, and Italian, which, in the last twenty years, compete who brings into Albanian, with translation rights, the works of the best contemporary literature authors, as well as modern and classical literature from around the world.

Albanian writers who publish in Kosovo, are more or less known in European literature. For instance, Rexhep Qosja, although he is considered a great writer by critics and researchers, although he has written postmodern prose, he has penetrated very few countries in the world since his work has been translated into very few languages, eight in total until today, mainly in Slavic languages: Serbian, Macedonian, Croatian, and Slovenian. These minor languages have not made this writer great like Albanian criticism considers him. Penetration into these languages has not made great either his contemporaries from Kosovo, such as Anton Pashku, Azem Shkreli, Din Mehmeti, Ramiz Kelmendi, Ali Podrimja, Agim Vinca, and others who have brought in Albanian, either translated or adapted, also in cooperation with translators Ymer Jaka, Murat Bejta, Masar Stavileci, Abdylazis Islami, Halit Halimi and others, authors of the French, Russian, Serbia, Bosnian, Macedonian literature.

This intercommunication of this medium (the book) should have a larger territory than it has today. This horizon would expand if the Ministry of Culture of Kosovo and its homologues in the Balkans' countries would implement programs for the translation of authors' works in Balkans languages, then in English, French, German, Italian, Russian, Arabic, which have now become second official languages in many countries. Therefore, even though we are surrounded by many neighbours, we do not have a good cultural communication that would help us, when they are financially capable, to present our talents to the world. Thus, we remain unknown to "minor literatures" and they remain unknown to us, which are created in Serbia, Croatia, Montenegro, North Macedonia.

Some time ago, by the end of the '90s, no other literature has been translated into Albanian more than the literature of these countries. Today, a different song is sang. But why are the cultural relations among the two nations not renewed?

First, because the national memory of war and the wounds that the war caused in ex-Yugoslavia are still fresh and open in many families although, for twenty years now, there have been attempts, through the dialogue taking place to improve them. Also, purely because of the lack of cooperation among authors and publishers and institutions of culture, the readers do not know the literary works, publishers, awards of the authors of these countries who still write and have been writing since 1945 and beyond; they do not know about their literary journals, about the places where they organize book fairs, and how many new titles of today's literature are presented in them. They try to learn about these literary events through electronic media of information. But, this does not suffice to move forward auspiciously. These "cold" neighbouring cooperation do not try to build bridges of communication like civilized countries and other neighbours do: the French with the Italians and the Spanish, or the French with the Germans and the Swiss and other nations. We hope that the literary awareness will increase in the next decade and that there will be a better political approach to the book and the culture, providing support to publishers and writers from the state, for presentation in other countries and languages. Until these measures are taken, we will take pride in our writers and will read their works, including foreign authors in the original language for those who know it.

### Summary

Regarding contemporary Albanian literature, the authors and their works presented in this article, it is worth noting that many other writers who create literary works in the West and East countries with motives of their country could not be presented here. Whenever the time comes to write a history book of the Albanian literature similar to some texts of this kind that have been produced, the ones who were not included here should also be included, and make a complete presentation of them, whose database is within this framework that we have given in these pages, whereas the evaluation of their works, beside professional researchers and critics, will continue to be given by the readers. We believe that there are many works of Albanian writers which need be discussed for the values they do not hold and which have given them unmerited reputation in our literature, not including foreign literature. Additionally,

maybe it is the time to open the dossier of Albanian literature, to discuss the real values of the works written half a century ago, and which continue to be published in the last decade, which are discussed too little and which, for the literary values they have, should be discussed more and the same be included in the programs of primary and secondary school as well as faculties, which are currently not included.

### **Bibliography:**

- Aliu, A., et al., 2002.** *Letërsia bashkëkohore shqiptare: 4*. Prishtinë, Albas.
- Bihiku, K., 1978.** *Historia e letërsisë shqiptare të realizmit socialist*. Naim Frashëri, Tiranë.
- Demaçi, A., 1955.** Gjarpërinjtë e gjakut, *Rilindja*, Prishtinë.
- Elsie, R., 1997.** *Historia e letërsisë shqiptare, Toena*, Tiranë.
- Elsie, R., 1995.** *Një fund dhe një fillim: vështrim mbi letërsinë dhe kulturën shqiptare bashkëkohore*, Gjon Buzuku, Prishtinë.
- Gjoshi, R., 2017.** *Mësimdhënia e gjuhës shqipe në Kosovë: aspekte historike dhe didaktike*, Armgedoni, Prishtinë.
- Hamiti, S., 2002.** *Vepra 9: Letërsia bashkëkohore shqiptare*, Faik Konica, Prishtinë.
- Islami, N., 2003.** *Historia dhe poetika e dramës shqiptare I-II (1886-1996)*, Universiteti i Prishtinës, Fakulteti i Arteve Dramatike, Prishtinë.
- Kuçuku, B. et al., 2004.** *Letërsia shqiptare, 4, Libri Shkollor*, Prishtinë.
- Kuçuku, B. et al., 2015.** *Zemra e qiellit, antologji e poezisë shqipe të shekullit XX*, Kosova PEN Center, Prishtinë.
- Prendi, A., 2015.** *Letërsi shqipe bashkëkohore: ndërthurja e poetikave dhe çkodimi i realiteteve metafizike në romanin bashkëkohor*, Fiorentina, Shkodër.
- Prendi, A., 2005.** *Probleme, autorë dhe vepra nga letërsia shqipe bashkëkohore*, Fiorentina, Shkodër, 2017
- Qosja, R., 1979.** *Prej tipologjisë deri te periodizimi*, Rilindja, Prishtinë.
- Radogoshi, K., 1985.** *Poetika e romanit bashkëkohor shqiptar me tematikë të shekullit XV*, (tezë magjistrature, UP, Fakulteti Filozofik.
- Raifi, M., 1977.** *Mbi poezinë bashkëkohore shqiptare*, Rilindja, Prishtinë.
- Rugova, I., 1986.** *Kahe dhe premisa të kritikës letrare shqiptare (1504-1983)*, Rilindja, Prishtinë.
- Rrahmani, K., 2006.** *Letërsia bashkëkohore, 13*, Albas, Tiranë.
- Sadiku, S., 2013.** *Rendi i vlerave në poezinë bashkëkohore shqiptare*, Beqir Musliu, Gjilan.
- Shema, I., 2015.** *Kultura letrare bashkëkohore*, Lidhja e Shkrimtarëve e Kosovës, Prishtinë.
- Vinca, A., 1985.** *Struktura e zhvillimit të poezisë shqipe : (1945-1980)*, Rilindja, Prishtinë.
- Vinca, Agim, 2005.** *Kënga e hapur, Brezi '81*, Prishtinë.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.18>

*Lindita Tahiri*  
*University of Prishtina (Kosovo)*  
[[lindita.tahiri@uni-pr.edu](mailto:lindita.tahiri@uni-pr.edu)]

*Anton Berishaj*  
*University of Prishtina (Kosovo)*  
[[daniber99@hotmail.com](mailto:daniber99@hotmail.com)]

## Religion as Escape and New Shelter: Defamiliarizing History in Popular Fiction

**Abstract:** *The downfall of Realist Socialism in the post-communist environment of the Albanian speaking countries opened the way for the development of a variety of literary genres as well as for the growth of popular fiction. This paper focuses on the best-seller by Ben Blushi Living in an island (2008) which covers four centuries of Ottoman occupation of Albania. The novel has provoked profuse debates within the Albanian speech-communities in the Region and was accused by the Muslim community for endangering the religious harmony and tolerance of Albanians. This paper argues that the blame derives from the interchange between the author and the narrator and from the inability to differentiate between different points of view within the narrative. Although literary critics have generally developed negative connotations about popular fiction as a kind of literature associated with industry, entertainment and escapism, the article claims that the popular novel by Blushi raises an important public debate about vital historical concerns such as whether the acceptance of Islam by Albanians was wilful or imposed. Rather than giving simple answers to these questions, Blushi's novel provokes alternative ways of thinking about whether Albanians agreed to banish Christianity and accept Islam due to violent intrusion or due to free will, and if the conversion into another religion was a new way of survival and a shelter of self-protection.*

**Key words:** *Ben Blushi; Albanian literature; Islam; Popular fiction; Ideology.*

### Introduction: from state propaganda machinery to commercial industry

During the last decades, the study of literature has started to include popular fiction within its scope of study and scholars are increasingly talking about literariness as a potential of all language which may be present in different kinds of discourse and not only in the language conventionally perceived as literature. However, academia is still resistant on

the concept of popular literature and when in 2003 the National Book Foundation in USA chose to give the annual award for distinguished contribution to Stephen King, the famous American literary critic and the Yale professor of literature Harold Bloom described this decision as the shocking process of dumbing down the American cultural life. Professor Bloom declared about Stephen King: “What he is, is an immensely inadequate writer on a sentence-by-sentence, paragraph-by-paragraph, book-by-book basis. The publishing industry has stooped terribly low to bestow on King a lifetime award that has previously gone to the novelists Saul Bellow and Philip Roth and to playwright Arthur Miller. By awarding it to King they recognize nothing but the commercial value of his books, which sell in the millions but do little more for humanity than keep the publishing world afloat” (2003). Furthermore, in his despise for popular fiction, professor Bloom claims that: “[b]ad writing is all one; great writing is scandalously diverse” (2000, p. 143).

In the Albanian speaking countries, literary criticism mostly considers popular literature as dependent on the commercial logic and massive taste, in difference to literary fiction which is studied at the academia. In the aftermath of communism, which put an end to the literary style of Realist Socialism institutionalized by the state, literary publications became part of an industry where they compete for the attention of consumers, like any other product in the market. Popular fiction is perceived as entertainment with a lot of commercial potential and with little artistic significance, due to the simplistic narrative features such as plot and character portrayal.

However, if the collapse of Socialist Realism brought to an end the treatment of literature as machinery for state propaganda, is literature still socially important and how? Taking into account the rise of the consumer culture and the popular literature worldwide, the question emerges about the social commitment of this massively read literature. After the ideological manipulation of literature in communism, can we still believe the spirituality of literature as Jacques Barzun strongly claims that “art has been defined over and over as highest spiritual expression, superior to religion in that it is the only activity that does not lead to killing” (2000, p. 713). In particular, considering the mindset of interaction with the public that is enabled with the new age of Internet, there is a need to focus on the way how popular fiction interacts with readers providing space for discussion about problems that preoccupy the society.

The term of popular fiction, as Gelder (2004) says, has acquired negative connotations in the 1940s by two cultural critics, Theodor W.

Adorno and Max Horkheimer, for whom this term expressed the modified nature of mass cultural forms in modern capitalism which deceives consumers. Nevertheless, scholars like Easthope (1991) think that despite the formulaic rhetoric of popular fiction, readers may choose the perspective of critical reading, pointing out the dominant positions that are constructed in the text in accordance with the ideology of the specific historical period. As Sadowski claims (2001, p. 300) the communication with the text depends on the capacity of the reader to agree on the basic denotations of the author's language, as well as on the connotative and associative semantic shades, without misinterpreting any linguistic level of the text. Unfortunately, the Albanian post-communist readership is still disposed to demagogic rhetoric and is prone to designate ready-made messages of the author rather than unfolding various possible interpretations of the literary narrative as the Blushi's best-seller has shown.

#### **The implied author as creation of the flash-and-blood author**

The paper will use the concept of narrative perspective, which has become increasingly significant in differentiating between different points of view within the literary narrative. Taking into account the heated argument that was caused by Ben Blushi's novel, and in particular considering the condemnation of the Muslim community for the messages transmitted by the literary narration, the notion of perspective is used to indicate the differences between the narratorial and characters' point of view emphasising the fact that neither of them should be taken as the author's own judgment and distinct message sent to the reader.

Intentionalism was described as fallacy by the U.S. literary critics Wimsatt and Bredsly (1954) who do not reject the presence of an authorial intention but rather do not see it of prime critical importance. A useful device to bypass the issue of authorial agency is the term 'implied author' coined by Booth (1961) to designate a textual construct which occupies neither the level of story nor the level of narration. The implied author is created by the real author and their opinions do not have to be mutually shared. However, this notion becomes problematic and for some scholars such as Nünning (1997, p. 86) it is ill-defined and paradoxical, appearing both as the source and as the construction of the text. Nevertheless, Booth (2005) re-examined the notion of implied author relating it to our everyday adjustment of behaviour according to different social contexts. As Booth says "we imply a version of our character that we know is quite different from many other selves that are exhibited in our flesh-and-blood world. Sometimes the created versions of our selves

are superior to the selves we live with day by day; sometimes they turn out to be lamentably inferior to the selves we present, or hope to present, on other occasions. ... We simply wipe out those selves that we don't like, or that at least seem inappropriate for the moment." (77) Furthermore, he states that the implied authors are the better selves and even the more genuine version of the selves constructed by the real authors and that we should be thankful for these superior versions that elevate both their worlds and ours.

In spite of the shortcomings of the concept of implied author, Booth accomplished to initiate the distinction between the flash-and-blood author and the author's deliberate construction, thus leading to inquiries about how to interpret the value-judgements in the literary narrative and how to identify their source which if it is not relatable to the real author. Actually, the relation between the real author and the constructed voices within fiction is the typical terrain of experimentation for modernist writers who evoke relative and provisional truths, with the awareness of 'reality' as a constructed fiction (Jesse Matz, 2004).

Once the peripheral nature of the authorial intention is established, the source of the opinions and beliefs articulated in a literary narrative is interpreted in relation to the perspective of narration. The metaphorical term 'perspective of narration' together with the two other figurative images 'point of view' and 'focalization', are most commonly discussed concepts in narratology. The term perspective has been used by some scholars like Fowler (1983) following Uspensky (1973) and distinguishing between the internal perspective of the character and the external perspective of the narrator. Genette (1980) distinguishes between the external and internal focalization, as compared to the objective stance or zero focalization. Focalization was later adopted by Rimmon-Kenan (2002) covering emotive, cognitive and ideological orientations as well. The focalizer is called reflector by James (1972) and Stanzel (1984), filter by Chatman (1990), whereas in Anglo-American criticism the term point of view prevails (Niederhoff, 2013, p.1).

The scholarly discussion about the classification of these narratological tools is still continuing, and this debate also reflects "[n]ew perspectives and ways of thinking...on issues such as human subjectivity, power, responsibility, gender, class, race, sexuality mind, the construction of history, disciplinary boundaries, truth-effects, and the nature of the linguistic sign." (Waugh, 2006, p. 4-5). The argument about subjectivity becomes particularly important when discussing the narrative perspective in literature, where subjectivity is constructed through the char-

acters' interior portrayal. According to Cohn (1978), who classified the modes of transmitting characters' interior world, the power to transmit characters' intimate experiences and to possess knowledge about their inner life is one of the crucial signposts of fictionality.

### **The narrator in literature vs the author in history**

The criticism about anti-Muslim ideology in Blushi's novel was accompanied by the disapproval of historians such as the reputational Albanian scholar Kristo Frashëri who declares that the book suffers from historical falsehood (2008). Actually, the prevailing criticism of the book was caused by the easiness of reading literature as if it was factual history and by looking for corresponding parallels in both. According to Dorrit Cohn (2000) the main distinction between the narrative in history and in literature is the detachment of the narratorial voice from the author, along with other signposts of fictionality such as the lack of referential level and the knowledge about the inner life of the characters (p.110). Let us see the presence of these indicators in the literary narrative of Blushi's novel.

The narrative of *Living in an island* covers almost four centuries of Albanian history through the portrayal of the life of an Albanian family embracing simultaneously two religions, Islam and Christianity. The plot is set through renown historical characters and events in Albanian history that have been explored in a different light compared to traditional portrayals of these characters. One of them is Ali Pashë Tepelena, an Ottoman Albanian ruler, who served the administrative apparatus of the Ottoman Empire for more than three decades and when rebelling against the Empire he was killed. His controversial historical figure has received both respect and disapproval by historians, whereas in Blushi's novel Ali Pasha says:

Is it worth dying in order to make people worship Mohamed instead of Jesus Christ and vice versa? Both prophets were in heaven: one of them holding a glass of milk and the other one with a glass of wine, while Albanians were fighting over who drinks the glass faster. They fight because there do not have anyone made of flesh and blood who can be their leader. (p. 52)<sup>1</sup>

This is the interior monologue of Ali Pasha, and as Cohn says the knowledge of the interior world of the character may be performed by the

---

<sup>1</sup> Here, as in the following cases, the English translation of the Albanian texts is done by L. Tahiri.



literary narrator and not by the historian. The ironical tone of Ali Pasha's thoughts may be interpreted as authoritarianism, slyness, or maybe humour and pragmatism depending on the adoption of the narrating perspective, which could be seen as the point of view of the character or of the narrator. However, the narrating perspective should not be directly related to the real author, as in the case of historical narration which would not be able to penetrate the inner life of the character without sounding speculative. Therefore, if the reader of Blushi's novel concludes from this passage that the real author is trying to send a straightforward message about Ali Pasha's character, then such reading becomes dogmatic and reduced, losing the power of interpretation that the literary narration provokes.

One of the main characters in the novel is another important historical figure, Arianit Komneni, the leader of several successful battles against Ottoman Empire who was the father-in-law of Gjergj Kastrioti Skanderbeg. Here is what Komneni declares in the novel:

Skanderbeg did not fight against Islam and this is one of the biggest lies of our history, said the old man quietly. [...] You should know that he fought for power and not for faith. All his life he dreamt to be the king of Albania, and if Turks had recognized his ruling then he would have remained a Muslim, as he had been during his youth. [...] Skanderbeg's failure is the failure of Albanians, who believe that you can get rich as a Turk while living as a Christian. [...] Skanderbeg lost his own peace when he was converted into a Muslim as a little boy in the Sultan palace, and he suffered even harder when he returned in Albania and became Christian again in order to convince Albanians to accept him as their king. [...] Arjanit Komneni was the craved leader of Albanians. If Skanderbeg did not cheat him in a typical Turkish fashion, Albanians would have found in Komneni their king with ancestry from Byzantian emperors. This relationship would have ensured them the connection with the European Christianity and we would be living today in a Christian kingdom. (pp. 54-59)

The words uttered by Arianit Komneni may portray him as an honourable person who would have changed history compared to the manipulative Skanderbeg, and on the other hand his declaration can be interpreted as frustration and rivalry towards his son in law. Different readings are the result of irony which makes this literary narrative exposed to multiple points of view.

When visiting the mosque for the first time, deciding to convert into a Muslim, the former Christian asks about the conditions which should be fulfilled in order to accept the new faith, and the Imam tells

him that one of them is to give meat to the poor after the end of Ramadan. The former Christian declares that all poor people of the village are Christians and hence he does not have to give gifts to those who do not pray to Allah. The third person narrator transmits the speech of the character blended with his thoughts:

Are Christians supposed to gain gifts, this is what I am trying to say, he concluded, once he understood that he demonstrated logical superiority even at the very first Islam lesson. (p.13).

If the judgmental expression is interpreted as external narrative perspective, it would be understood as the privileged omniscient voice which claims supremacy of one religion over the other. However, if the narrator is considered as non-intrusive, which is indicated from stylistic features such as free indirect speech, deictic expressions and tense, such an interpretation would regard the evaluative expression belonging to the character who is portrayed as arrogant and utilitarian. In the first case the expressed judgment of superiority would function as the opinion of the narrator regarding the advantage of one religion over the other, and in the second case because of the internal perspectivism the same opinion would become the judgment of the narrator for the character.

Further on, the priest, learning the news about the newly converted Ibrahim, gives a speech to his fellow citizens who are enraged and who want to isolate the house of the first Muslim in their village:

Stop shouting you drunkards [...] You have accepted religion as a spiritual tax which can be avoided with slyness. [...] You always take the religion of your invader and therefore you will never have your own state because when the occupier goes away, you join the new invader. [...] Albanians think that they are poor because Christ does not care about them as he cares about Greeks and so they cheat on Christ because they feel betrayed. (pp. 23- 25)

These words are uttered by the Greek priest, and they can be perceived as the perspective of the narrator or of the character. In the first case the generalization about Albanians as deceitful, faithless and envious will be interpreted as common wisdom conveyed by the narrator, whereas in the second case the portrayal of the Greek cleric may be interpreted as prejudice and insult towards Albanians.

On the other hand, the Imam in the city of Voskopoja speaking to the people who have come to pray in the mosque says:

Islam does not have islands. It is a wide and quiet sea where those who drown are not those who get inside but those who go outside. Voskopoja cannot remain an island in our sea. [...] Islam means peace, but

you have to fight for peace. There would not be Islam if Mohamed did not fight against all those who fought against Islam (p.272).

Correspondingly, these words can be processed as belonging to the character or to the narrator, and in the first case the Imam is portrayed as a cunning personality provoking hate against other religions, whereas in the second case the narratorial perspective suggests irony, associating all religions with indoctrination. Alternations of narrative perspectives during the interpretation of literary texts influence the way how readers perceive the relation between the narrator, characters and narrated events, highlighting the ideological point of view of the narration. As Fairclough (2001) states, both production and the interpretation of a text have an interpretative character and the formal features of the text are traces of that interpretation. (p. 67)

Obviously, there are readers of the Albanian community who have decided to read the novel as factual declaration of the author about an historical period of Albania, and these kinds of readers do not differentiate between narrative perspectives and fail to recognize irony which triggers multiple interpretation. Moreover, scholars argue that history itself is a construction and should not be taken as undisputable absolute declaration because historians do not record events, but they redescribe what has happened producing their own story. As Hayden White (2002) says: “[h]istory is in bad shape as a discipline today because it has lost sight of its origins in the literary imagination” (p. 209).

### **Ambiguity and metafiction**

The narrating style in Blushi’s novel avoids the authority of a final and privileged source of judgments and often uses intertextual symbolism through Biblical and Islamic identification of the characters that in accordance with the saint stories are perfectly fit to the life-paths of their own names. For instance, Ibrahim, the converted Christian, went to the mosque because he did not manage to sell his lambs in the market, resonating the story of Abraham and the lamb. He refuses the Imam’s proposal to change his name into Abdullah, because it sounds like ‘budalla’, which in Albanian means “fool”. The intertextual symbolism and the lucid humour of the narrative provoke undetermined impressions and make it challenging to clearly define the characters. The narrative about the mixed religion within one single family corresponds with the uncertainty of the character portrayal, which some scholars consider as an important literary ingredient for attracting the readership. According to

Shafer and Raney (2012) as well as Krakowia and Tsay-Vogel (2014) the morally ambiguous characters are more present in popular culture as they are more appealing to the public. Furthermore, scholars suggest that controversial attitudes and moral doubts inspire action into the story (Egri, 1960; Weijers, 2014).

Another stylistic trait in this novel that provokes the power of interpretation and keeps the narrating voice invisible is metafiction. Shklovsky (1921) had drawn attention to self-references within narration of *Tristram Shandy* and Booth (1952) highlighted self-conscious narration, however the term “metafiction” was initially used by Scholes in 1970. Genette (1980) regards meta-narration as a function of the narrator, and Prince (2003) relates it to the text. In the first detailed study of metafiction Hutcheon (1980) considers metafiction as a superb narrative technique which emphasises the artifice of art and at the same time invites the reader to become co-creator in interpretation. According to Waugh (1984) metafiction highlights the relation between fiction and reality, whereas for Currie (1995) it is a dialogue between literature and literary criticism. Alternatively, Nünning (2004) distinguishes between meta-narration and metafiction, as the first one reflects on the narrative process, whereas the latter is self-reflection about fiction.

The self-reflection about fiction appears all over the narrative, and in particular it is observable in the closing chapter when Isaac has a conversation with Sara:

The book belongs to the knowledgeable, who are usually the most powerful. [...] Turks are not an eternal winter and it is worth living if you have perfected life in an island. When they leave, we will write again the book we have lost, but there will be a few pages about the Turks inside the book, as they will never die in our memory. (pp. 403-404)

In this fragment, the reference to the book while telling a story within the book invites the self-awareness of the reader about the process of reading aiming to present how knowledge and understanding take place. Furthermore, the linguistic identity of history is foregrounded, emphasising the possibility of ‘loosing’ and ‘writing’ the past, which is decided by the ‘powerful’. The metanarrative comments through the novel serve as a reminder about the relation between history and fiction, and ultimately between life and fiction. The self-reference to narration highlights the constructed nature of knowledge and creates a powerful metaphor of the interaction between life and fiction.

### **Popular fiction as an agent of public discussion**

Popular fiction is usually labelled as entertainment and as a form of commercial production, with less complex stylistic traits compared to Literature and with narrative traits such as simplicity, exaggeration, consumed figurative language, schematism and so on. To sum it up, popular fiction is often regarded as a 'culture industry'.

The narrative and thematical features of Blushi's novel are typical conventional traits that are found in modern literature, such as: the focus on the internal perspective of the characters, the transmission of the unconsciousness of the characters, the non-intrusive narratorial voice, the moral ambiguity of the characters, the non-linear narration, symbolism and irony, intertextuality and metafiction, refusal of history and myths, challenge of absolute truths and exposure of the fictive construction of reality.

Bearing in mind the thematic and stylistic modernity of Blush, one can raise the question about the status of his best-selling novel, whether it is popular novel or a literary one with a capital 'L'. If the usual criticism of popular fiction as schematic and uniform narration does not apply for the novel *Living in an island*, the question arises if a popular book must be schematic, and whether stylistic indicators of the modern novel go well together with popularity.

When keeping away from the simplified and polarized division of these two genres, it becomes apparent that the popular fiction may have an effect in the discussion of important societal issues. In this particular case, the literary narrative comes as an historical allegory pointing to the challenging subject of the religious background of Albanians, as well as pointing to the everlasting questions on the meaning of notions such as love, life, war, peace, faith and nation.

The power of the written artistic word was recognized at first by Plato for whom poetry damages readers by offering them falsehood and fiction. As Waugh (2006) asserts Plato has analysed texts that were performed in public and that reached a huge popular audience, so he understood the power of performances over people and over culture (43). Waugh's statement is substantial when discussing the power of the popular fiction as in the case of Blushi's novel which has provoked public discussion about problems that preoccupy the Albanian society.

### **Conclusion**

The popular Albanian best-seller *Living in an island* by Ben Blushi explores important national, religious and identity themes and defamiliar-

izes readers with the period of Ottoman occupation of Albania telling the story of a family with mixed religion as an historical allegory pointing to the challenging subject of the religious background of Albanians. The book defies the traditional representation of important historical figures, amongst them Skanderbeg, the most prominent figure in the history of Albanians, famous for his resistance against the Ottoman Empire. This novel has aroused abundant comments and discussions on the question of Islam and whether it was aggressively imposed to Albanians or whether they accepted it by free will as means self-preservation.

However, the readership in some cases has neglected the narratorial perspective by identifying the real author as the source of the value-judgements within the book. In particular the Muslim community has condemned Blushi for the messages transmitted by the literary narration, interpreting the text as author's own attitude and distinct message sent to the reader. Furthermore, the novel has been approached as factual history, in spite of distinct signposts of fictionality such as the transmission of the inner life of the characters and the detachment of the narrator from the author. The presupposition of prior knowledge of the factuality of the narrated events by the author in relation to the reader has been sometimes vulgarized during public debates up to the point of trivializing the novel's content.

Although the term 'popular fiction' has acquired negative connotations associated with amusement and consumerism, Blushi's bestseller does not send schematic and ready-made messages about the historical events of the Ottoman ruling of Albania, but it rather provokes the power of interpretation avoiding the dogmatic and reduced reading of history. The non-intrusive narrator alternates narrative perspectives influencing the way how readers perceive the relation between the narrator, characters and narrated events, highlighting the moral ambiguity of the characters, which some scholars consider as an important literary ingredient for attracting the readership.

Blushi's novel is characterized by post-modern literary features such as intertextual symbolism and metafiction, which foreground the linguistic identity of history implying the editorial, selective and interpretative roles of both the author and the historian. Metanarrative comments keep reminding the reader about the relation between history and fiction, and ultimately between life and fiction. Most of all, the self-reference to narration highlights the constructed nature of knowledge, presenting literature not as glorification of truth but rather as glorification of the energy of thinking.

**Bibliography:**

- Barzun, J., 2000.** *From Dawn to Decadence*. NY: Harper Collins.
- Bloom, H., 2000.** *How to read and why*. NY: Touchstone.
- \_\_\_\_\_, **2003.** For the literary world, 23 September 2003. *Newsday*. Available at: <https://www.newsday.com/for-the-literary-world-1.396944> [Accessed Sep. 2020].
- Booth, W. C., 1952.** The Self-Conscious Narrator in Comic Fiction before Tristram Shandy. *Publications of the Modern Association of America*. 67, pp. 163-185.
- \_\_\_\_\_, **1983.** *The Rhetoric of Fiction*. Chicago, USA: The University of Chicago Press.
- \_\_\_\_\_, **2005.** *Resurrection of the Implied Author: Why Bother?* In: J. Phelan and P. J. Rabinowitz, eds. *A Companion to Narrative Theory*. Blackwell Publishing, pp. 75-88.
- Blushi, B., 2008.** *Të jetosh në ishull* (Living in an island). Tirana: Onufri.
- Chatman, S., 1990.** *Coming to Terms: The Rhetoric of Narrative in Fiction and Film*, Ithaca and London: Cornell University Press.
- Cohn, D., 1978.** *Transparent Minds: Narrative Modes for Presenting Consciousness in Fiction*. Princeton University Press.
- \_\_\_\_\_, **2000.** *The Distinction of Fiction*. John Hopkins University.
- Currie, M., 1995.** *Metafiction*. New York: Longman.
- Easthope, A., 1991.** *Literary Into Cultural Studies*. New York: Routledge.
- Egri, L., 1960.** *The Art of Dramatic Writing*. New York: Simon & Schuster.
- Fairclough, N., 2001.** *Language and power*. London: Longman.
- Fowler, R., 1983.** *Linguistics & the Novel*. 3<sup>rd</sup> ed. NY and London: Methuen.
- Frashëri, K., 2008.** *Pro & kundër Blushit* (For and Against Blushi). Tirana: Onufri, pp. 209-216.
- Gelder, K., 2004.** *Popular Fiction: the Logic and Practices of a Literary Field*. Routledge.
- Genette, G., 1980.** *Narrative Discourse: An Essay in Method*. Ithaca: Cornell University Press.
- Hutcheon, L., 1980.** *Narcissistic Narrative. The Metafictional Paradox*. Waterloo, Ontario: Wilfried Laurier UP.
- James, H., 1972.** *Theory of Fiction*, Lincoln: University of Nebraska Press.
- Krakowiak, K. M. and Tsay-Vogel, M., 2015.** The Dual Role of Morally Ambiguous Characters: Examining the Effect of Morality Salience on Narrative Responses. *Human Communication Research*, 41, pp. 390-411.
- Matz, J., 2004.** *The modern novel*. UK: Blackwell.
- Niederhoff, B., 2013.** Perspective/point of view. In: P. Hühn et al., eds. *The Living Handbook of Narratology*,
- Nünning, A., 1997.** But why will you say that I am Mad: On the Theory, History, and Signals of Unreliable Narration in British Fiction. *AAA Arbeiten Aus Anglistik und Amerikanistik*, 22 (1), pp. 83-105.
- \_\_\_\_\_, **2004.** Towards a Definition and an Outline of the Functions of Metanarrative Commentary. In: J. Pier, ed. *The Dynamics of Narrative Form: Studies in Anglo-American Narratology*. Berlin: De Gruyter, pp. 11-57.
- Prince, G., 2003.** *A Dictionary of Narratology*. Aldershot: Scholar Press.

- Rimmon-Kenan, Sh., 2002.** *Narrative Fiction: Contemporary Poetics*. London: Methuen.
- Sadowski, P., 2001.** Control, information, and literary meaning. *European Journal of English Studies*, 5 (3), Routledge, pp. 297-300.
- Scholes, R., 1970.** Metafiction. *Iowa Review*. 1(4), pp. 100-115.
- Shklovsky, V., 1990.** *Theory of Prose*. Benjamin Sher, trans. London: Dalkey Archive Press, pp. 147-171.
- Shafer, D. M., and Raney, A. A., 2012.** Exploring How We Enjoy Antihero Narratives. *Journal of Communication*, 63, pp.1-19.
- Stanzel, F. K., 1884.** *A Theory of Narrative*. Cambridge University Press.
- Storey, J., 2015.** *Cultural Theory and Popular Culture: An Introduction*. New York: Routledge.
- Uspensky, B., 1973.** *A Poetics of Composition*. Transl. by V. Zavarin and S. Wittig. Berkeley: University of California Press.
- Wales, K., 1996.** *Personal pronouns in present-day English*. Cambridge.
- Walsh, R., 2003.** Fictionality and Mimesis: Between Narrativity and Fictional Worlds. *Narrative* 11 (1), pp. 110-113.
- Waugh, P., 1984.** *Metafiction: The Theory and Practice of Self-conscious Fiction*. London: Methuen.
- \_\_\_\_\_, 2006. *Literary Theory and Criticism*. An Oxford Guide. Oxford University Press.
- White, H., 2002.** The Historical Text as Literary Artifact. In: B. Richardson, ed. *Narrative Dynamics*. The Ohio University Press, pp.191-211.
- Wimsat, W.K. and Beardsley, M. C., 1954.** The Intentional Fallacy. *The Verbal Icon: Studies in the Meaning of Poetry*. University of Kentucky Press, pp.2-18.
- Weijers, A., 2014.** *The craft of screenwriting*. Hague: Boom Lemma Uitgevers.



*Садък Хаджъ*  
*Анкарски университет*

*Sadik Hacı*  
*Ankara University*  
[shaci@ankara.edu.tr]

*Зейнеп Зафер*  
*Анкарски университет*

*Zeynep Zafer*  
*Ankara University*  
[zzafer@ankara.edu.tr]

## Съвременната българска литература и турцизмите За “Дервишки караконджул” на Хасан Ефраимов

**Abstract:** *To the Turkish words in the official Bulgarian Language today there is a negative attitude. The presence in the Bulgarian literary language of great number of lexemes of Turkish origin, which are not recognised from the big part of society, even specialists, as Turkish and which do not have Bulgarian counterparts, is not acknowledged as a valuable contribution to the basic lexical fund. The interest is focused on the usage of some Turkish words with pejorative meaning in journalistic and everyday speech. The function and the stylistic-emotional characteristics of the Turkish loan words in the present artistic texts are not researched.*

*In the paper the Turkish words in the artistic debut of the contemporary writer Hasan Efraimov „Dervish Karakondzhul“ (evil ghost) presenting the representatives of Turkish cultural and linguistic environment, having specific national colour, are analysed.*

**Key words:** *Turkish Words; Bulgarian Language; Hasan Efraimov; Turkish cultural and linguistic environment.*

Целта на статията е да установи как Хасан Ефраимов подхожда към майчиния си език, прекалява ли с употребата на турцизмите като реакция срещу съзнателното им прогонване, ограничаване и изолиране. Съзнателно или спонтанно те се вписват в текстовете му, зависими ли са от средата, региона и обитателите им, прилягат ли на езика на героите-турци и на авторската реч? В нея се анализират както турцизмите-реалии, които са свързани с бита на делиорманските турци, така и тези, които в някои художествени стилове и най-вече в публицистиката се употребяват с пейоративно значение. Нас-

тоящото изследване има за цел да набележи функционалността на турцизмите в белетристичната тъкан на автора, приносът им за постигане на богат и многопластов художествен стил.

Турцизмите<sup>1</sup> са съществен елемент в българския език, без значение на това в кои стилове и с каква стилистична окраска присъстват в него или какви са техните стилистично-емоционални характеристики. През комунистическия период се стигматизират диалектите и турцизмите в тях, които са живи и не се използват с пейоративно значение. Част от турските заемки, които са премахнати от книжовния език, все още присъстват както в разговорния стил, така и в неофициалната комуникация дори сред представители на интелигенцията.

В съвременна България в отношението към турцизмите се забелязва интересно противоречие, въпреки че в диалектите те и днес съхраняват първичните си значения за разлика от медийния дискурс. От една страна, те се игнорират, към тях се проявява силно пренебрежение и се изследват преди всичко като заемки с негативно значение, а от друга страна, в книгите за българския бит и култура, в учебниците по български език за чужденци *лозовите сармички* (уаррак сармаси), *суджукът*, (sucuk) *шекembe чорбата* (işkembe çorbası) и др.<sup>2</sup> с гордост се представят като част от “българската национална кухня”, за свой се приема турцизмът *йогурт* (yoğurt), разпространен по света като “български” *йогурт*<sup>3</sup> и след демократичните промени в България с това име се произвежда марка кисело мляко.

Художествените текстове представляват доста сложна и наситена с много пластове езикова организация, въздействаща емоционално върху читателя с всичките си изразни средства. Като че ли болшинството български езиковеди, занимаващи се с турцизмите,

<sup>1</sup> Всички думи, навлезли в българския език посредством турския език, се възприемат като турцизми. Мнението ни по този въпрос съвпада с това на руския лингвист, балканист и специалист по български език С. Б. Бернщейн (Бернщейн 1984: 9), който го изразява в свое изследване още в 1941 г.

<sup>2</sup> Все още в Речника на българския език на БАН немската дума *Kaiser* се посочва като първоизточник на *кайзер* или *кайзер пастърма*, въпреки че значението ѝ няма нищо общо с пастърмата. Кайзер произлиза от турската *kayseri pastirması*, чието име идва от град Кайсери, където ниските температури благоприятстват за произвеждане на най-вкусната и най-известна пастърма в Турция.

<sup>3</sup> На всеки средно културен български гражданин му е известно, че *йогуртът*, подобно на *кефирът*, не е традиционен славянски или български млечен продукт, а турски.

поради националистически нагласи или политически съображения в миналото, а по традиция и днес, като езиков материал предпочитат текстовете на тези български класици, с които по-лесно защитават тезата си за пейоративното значение, за отрицателните конотации на турските заемки. Пренебрегват се възможностите и богатият емоционален потенциал, които те съдържат в себе си за постигане на по-образен художествен стил, за трансформиране на специална информация. Не са изследвани подробно тяхната честотност и функционалност в художествените текстове на Михалаки Георгиев, Димитър Подвързачов, Йордан Йовков, Чудомир, Николай Хайтов<sup>4</sup>, Свилен Капсъзов (Кешиф Ахмедов Капсъзов), Станислав Сивриев и др., които така майсторски ги използват. Почти не е обърнато внимание на билингвизма на автори като Йордан Йовков и любовта му към турския език, на съзнателния и уместен подбор на турска лексика и майсторското ѝ използване в художествената тъкан на неговите произведения. Не е отчетен приносът на тази лексика в майсторското слово на автора, изпъстрено с турски заемки.

Без турцизмите, натоварени с различни художествени функции, езикът на редица разкази на Йордан Йовков и Николай Хайтов би загубил голяма част от образността си, а героите им – непосредствеността и обаянието си. За да можеш да предадеш като жив религиозния Сали Яшар от разказа “Песента на колелетата”, трябва като автора му да умееш да се превъплъщаваш в неговия мисловен свят и да притежаваш талант и вътрешна нагласа за възприемане на движенията на щъркелите и тракането им с дългите си клюнове като (покана за) вечерна молитва, която предстои на героя-мюсюлманин. Наред с това да познаваш добре турския език, да притежаваш изключителен талант и да имаш смелост да наречеш една от любимите си героини със звучното име *Албена*, произхождащо от корена на турското съществително *албени* (*albeni* – обаятелност, обаяние, привлекателност)<sup>5</sup>. Този подход на твореца доказва, че когато писа-

---

<sup>4</sup> Тук не се спираме на мнението на Н. Хайтов за произхода на турските думи и спора му с М. Я. Янакиев.

<sup>5</sup> Както е известно името бързо се възприема от българския народ и с голяма любов продължава да се дава на момичета и момчета. И днес някои езиковеди не искат да приемат турския произход на личното име Албена. Йордан Йовков не желае да развали магията на това прекрасно име и никога не казва откъде произлиза, само се задоволява да отбележи, че то наистина приляга на характера на героинята от едноименния разказ. Сестрата на Йовков пред Димо Минев

телят познава и уважава даден език или култура, той може да ги използва майсторски в творчеството си и да дари българския език с нови думи и лични имена<sup>6</sup>.

Според Бодуен де Куртене “От езиковото мислене може да се извлече цялото своеобразно езиково знание от всички области на битието и небитието, за всички прояви на света – и материалния, и нематериалния, а също – индивидуално-психологическия и социалния, обществения” (Бодуен де Куртене 1963: 312). Турцизмите *хайдутин* (haydut)<sup>7</sup> или *чавдарче* (çavdar-ръж) са красноречиви примери за това как народни будители или партийни функционери за целите си могат да заредят със силно пропагандно и емоционално съдържание дадени думи, притежаващи доста негативно или съвсем непознато значение. Същевременно многобройни са турцизмите с положителен смисъл, които в резултат на внушаваните години наред чувства на ненавист и пренебрежение или поради непознаване на съдържанието им, с времето се отдалечават от истинския си смисъл и придобиват пейоративно значение.

Не липсват и примери за това как днес стандартният български език би могъл да се обогати със сполучливи новообразувани думи като *махмурлек* (Везенков 2010: 504), без да се изпитват каквито и да е комплекси за малоценност. Сложната лексема сполучливо е изкована от една турска<sup>8</sup> и една българска лексема. Съдържанието на въпросния неразчленим неологизъм говори за богато творческо въображение и майсторско попадение. Людмила Кирова в своето ценно изследване правилно подчертава: “*Не бива да забравяме, че заемането от турски е било в огромни размери и, както знаем, е засегнало и системата на езика. На практика българите са били билингвисти. Заемането секва отведнъж поради водената съзнателна борба за почистване на българския език и “турското наследство” е изолирано в езиковата периферия.*” (Кирова 2012).

Интересни са и случаите с “възраждането” или “амнистирането” в книжовния език на турцизми като *йогурт* (yoğurt), за който стана въпрос по-горе или на *кепенци* (kerenk/ler), който в електрон-

---

обяснява етимологията на името приблизително точно, свързвайки я именно с дадения турцизъм.

<sup>6</sup> Курорт Албена.

<sup>7</sup> haydut – въоръжено лице, което напада и обира пътници: вж. Güncel Türkçe Sözlük, Türk Dil Kurumu, sozluk.gov.tr

<sup>8</sup> От прилагателното *mahmur*.

ната версия на Речника на българския език на БАН<sup>9</sup> все още присъства единствено с формите си за ед. ч. *кепенец/кепенк* и по старому се тълкува като разговорна/остаряла, а в Български етимологичен речник, том 2 – като остаряла и диалектна лексема.

Сборникът на Хасан Ефраимов “Дервишки караконджул” (2016) е художественият дебют на автора, който за поразително кратък срок отпечатва общо 10 книги. Той съдържа 12 разказа, свързани сюжетно с общи герои, събития и географска среда, и като първа публикация представлява специален интерес за езиковеди и литературоведи, които изследват турцизмите в текстовете на съвременната художествена литература. Това, че авторът на сборника е турчин, израсъл в двуезична среда, и че разказите му отразяват живота на турците от едно делиорманско село, превръща темата в още по-интересна и комплексна. Не може да не възникнат някои въпроси. Например дали авторът използва турските заемки затова, че са незаменими лексикални средства или защото му предоставят широки възможности за предаване на естествена мюсюлманска среда и създаване на пълнокръвни герои-турци? Дали се възползва от актуалните местни турски названия, от топонимите, които не са отразени в никоя географска карта, по тази причина не са побългарени и затова продължават да съществуват с автентичните си наименования? Как авторът подхожда към реалиите? И много подобни...

Трябва да се подчертае, че турцизмите в разказите на писателя не са използвани като средства за дистанциране и разграничаване от нещо нежелано и дори ненавиждано, а любими и живи слова, познати на автора с всичките им смислови нюанси. Те му предлагат невъобразими възможности за внушаване на чувство за интимност и непосредственост, за сполучливо предаване на култура и идентичност, различни от българските. Естествено, в разказите са намерили място турцизми от българския книжовен език, които нямат български съответствия и които днес не се разпознават от голяма част от читателите, защото ги възприемат като домашни: (*джанка* (can eriği), *саксия* (saksı), *кафе* (kahve), *яка* (yaka), *кутия* (kutu), *тютюн* (tütün), *кесия* (kese), *пейка* (peyke), *юмрук* (yumruk), *шише(нџе)* (şişe), *ханче* (hap), *чорап* (çoğar), *пари* (para), *кафџав* (kahverengi) и др. Наред с това в текста се срещат турцизми и реалии, които принадлежат на други стилове. Благодарение на тях Хасан Ефраимов успява да предаде всекидневния бит и колорита, непосредствената езикова среда

<sup>9</sup> Вж.: <https://ibl.bas.bg/rbe/lang/bg/>

на делиорманския турски селянин, някогашната и днешна селска обстановка в района.

Още с първия прочит на разказите впечатление прави това, че авторът е наясно с възможностите, които турските реалии или думи съдържат за предаване на своеобразния местен колорит. Затова той съзнателно ги вгражда в текста, но имайки предвид рецепцията на съвременната читателска аудитория, за някои от тях предлага 32 бележки под линия<sup>10</sup>: *меджия* (*imese*), *ефенди* (*efendi*), *шейтан* (*şeytan*), *сюнет* (*sünnnet*), *хайманосване* (*om haymana*), *софра* (*sofra*), *барабар* (*beraber*), *хатип* (*hatip*), *кория* (*koru*), *ербан* (*erbar*), *табут* (*tabut*), *зурна* (*zurna*), *ага* (*ağa*), *намаз* (*namaz*), *рахатлък* (*rahatlık*), *кат* (*kat*), *яланджия* (*yalancı*), *кютюк* (*kütük/nüfus kütüğü*), *бадана*(рка) (*om badana*), *юз*(че) (*yüz*), *Байрам* (*Bayram*), *кехая* (*kâhya*), *Рамазан* (*Ramazan*), *кандисвам* (*kanmak*), *бетер* (*beter*), *Кюстенджа* (*Köstence*), *одая* (*oda/köy odası*), *филджан* (*fincan*), *хатър* (*hatır*), *дувар* (*duvar*), *темел* (*temel*), *чардак* (*çardak*). Друг е въпросът дали всички те се нуждаят от обяснение и дали има други, чието съдържание би трябвало да се даде в бележка под линия.

Хасан Ефраимов използва различни начини за предаване значението на някои турцизми. Например думата *шейтан* (дявол), която се среща 6 пъти, за пръв път се употребява в следното съчетание: “Дявол... сатана... шейтан...” (Ефраимов 2016: 16). Въпреки съчетаването ѝ със синоними, турската заемка *шейтан* е обяснена в бележка под линия. След това още на две места се среща заедно с български синоними: “за дяволи, за шейтани”, “за някакви демони... за шейтани...” (Ефраимов 2016: 56, 67). Към турцизма *темел* (основа) е приложена същата форма на двойно обяснение: “без основи... без темели...” (Ефраимов 2016: 56, 67). Освен описания метод за вграждане на турцизми, в текста се срещат и такива лексеми като *кепенци* (употребен 5 пъти), на които авторът не е дал обяснение под линия, тъй като думата, както вече беше споменато, се връща в стандартния български език и е известна на съвременната читателска публика. За реалията *дервиши* (мюсюлмански монах), която присъства в текста от началото до края, няма обяснение, защото тя е нарицателно име, в което се обобщава и върху което се фокусира главната идея на сборника, на което се базира философската и житейска концепция на автора.

<sup>10</sup> За румънските и гръцките заемки, за някои български думи и термини, непознати на съвременния читател, също са дадени обяснения.

Трябва да се подчертае, че част от турцизмите, чието съдържание е дадено в бележки под линия, са използвани в смисъла, известен само на носителите на турския език (герои или разказвачи), и той може да се намери единствено в специализирани етимологични речници. Значението, с което се срещат в текста, не е регистрирано дори в електронната версия на РБЕ на БАН, откъдето читателят най-лесно може да почерпи информация. Напр.:

*ага* (ağa) – влиятелен земевладелец, който се ползва с уважение; влиятелен, уважаван чорбаджия<sup>11</sup>.

*кютюк* (kütük/nüfus kütüğü) – регистър, официална книга за записване.

*одая* (köy odası) – специална селска стая, където селяните се събират по различни поводи и където се настаняват гостите на селото, които няма къде да отседнат.

Наред с обяснените от автора турцизми, в разказите срещаме и турски заемки от стандартния език или различни стилове, излезли от употреба, реалии от всекидневието на героите, лични имена, топоними и фразеологизми, включващи турски лексикални единици. Интересното тук е, че в по-голямата си част те са използвани не с пейоративните, а преди всичко с автентичните си или с придобилите в българския език значения, въпреки че в разказите неотменно се чувства спокойният, безгрижен и весел хумор на автора. Именно тук е разковничето на разликата в използването на турцизмите от Хасан Ефраимов, което го доближава до подхода на Йордан Йовков.

Очевидно е, че по отношение на повечето турцизми в текста, почерпени от различни области на бита и културата, не може да се говори за противопоставяне на книжовния с говоримия език, тъй като в голямата си част те принадлежат на стандартния турски език, чийто носители са героите и разказвачите<sup>12</sup>. Както вече беше подчертано, трудно би могла да се предаде естествената турска селска среда, всекидневният бит на мюсюлманина, без да се черпи от словесния запас на турцизмите в българския език като *ходжа* (hoca), *хатип* (hatip), *джамия* (cami), *минаре* (minare), *намаз* (namaz), *курбан* (kurban), *Байрам* (Bayram), *Рамазан* (Ramazan), *табут* (tabut),

<sup>11</sup> Не в смисъла, който умишлено беше даден на думата *чорбаджия* през комунистическия период. За съжаление, първичният смисъл на турцизма все още не е прибавен в електронния РБЕ на БАН.

<sup>12</sup> Изключение правят кметът на селото Кирчо и милиционерът Гошо, които са незначителни персонажи в разказите.

*махала* (mahalle), *софра* (sofra), *кафе* (kafe), *филджан* (fincan), *одая* (oda/köy odası), *дувар* (duvar), *темел* (temel), *акъл* (akıl) и мн. др., и авторът умело се възползва от потенциала, който тези езикови средства му предоставят. Понеже става въпрос за художествено изображение на среда, в която турският език е жив и пълноправен, той има прекрасната възможност пълноценно да черпи от силата на изразните му средства.

Още в дебютния си сборник Хасан Ефраимов, който едва ли мисли да се съобразява с някакви относителни езикови норми, проявява майсторство в съчетаването в текста на елементи от две доста противоположни като структура езикови системи, от две различни култури, въпреки че се обръща към съвременната читателска аудитория. За да постигне желанния хумор, писателят си служи с езикови средства, принадлежащи на съвременния разговорен (дори понякога безпардонен) български език, но сполучливо вгражда в него и турцизмите, от които има нужда за постигане на многопластов художествен стил.

В стремежа си да предаде бита и мисленето, философията на персонажите, да покаже комплексния им и противоречив свят и техния национален колорит, той се нуждае от смисловия потенциал, който съдържат турцизми като *кютюк* (kütük/nüfus kütüğü), *одая* (köy odası), *ага* (ağa) и *шейтан* (şeytan). Защото главните персонажи на разказите са ходжата на селото, Дервишкият караконджул, наричан още Али Курт или Курта<sup>13</sup>, които изповядват Исляма, принадлежат към друга култура и имат по-различно светоусещане, празнуват<sup>14</sup> *Байрама*, постят през месец *Рамазан* и са израсли с различни митове и легенди, с други приказки. Сред главните герои е и докторът на селото, повествователят, който е възпитан в същата обстановка, говори същия език, но същевременно като интелigent познава много добре българския език и българската култура.

За предаване на речевата обстановка в разказа “Яланджията”, навсякъде където обръщението е по име (3 пъти), Хасан Ефраимов предпочита оригиналното и морфологично немаркирано съществително *Яланджъ*, вместо *Яланджийо/Яланджия*, което е почти незабележимо, защото се разбира и не дразни. На няколко места в обръщението се среща и *ходжа ефенди* от т.нар. турска конструкция иза-

<sup>13</sup> Али Вълка или само Вълка.

<sup>14</sup> Повествованието се води само в първо лице и единствено в разказа “Дилек” повествователят е главният герой.



фет, което обращение е остаряло за стандартния български език, но е книжовно за непосредствена съвременна турска езикова среда, тъй като означава почит и уважение. Именно чрез него авторът набляга върху колорита на турската езикова ситуация. По аналогия на образци от турския разговорен стил той въвежда несъществуващите в българския речников фонд фраземи *рози-мози* и *хантибиотици или мантибиотици*<sup>15</sup>, които се възприемат за естествени, тъй като този модел съществува и в българския разговорен стил.

Интересното и различното в тези разкази е, че чрез използване на фразеологизми, съдържащи в състава си елементи от двата езика и стилистично оцветени, като *Акъла не ми го побира/побере*. (akıl almamak-2 пъти), *Изкарвам акъла*. (aklı çıkmak), *Троша хатъра*. (<birinin> hatırını kırmak), *Отпускам кесията си*. (kesenin ağzını açmak), *Докарвам/докарам беля <на главата>*. (bela getirmek), *Хващам се/Хвана се на бас*. (bahse girmek/tutuşmak), *Не на шега*. (şakası yok) не се цели принижаване на стила, а внушение за естествена турска езикова и културна среда. Макар че предпочетенният фразеологизъм *Акъла не ми го побира/побере*. има дублетна форма с българската лексема *ум* (*Ума не ми го побира/побере*), тя не би звучала така естествено в устата на персонажа-турчин. В случая предпочитанието на автора не снижава нивото на стила, а го прави по-естествен и значително го обогатява.

Интерес представлява устойчивото словосъчетание от същия модел *Хващам/хвана къра*, което е създадено по подобие на *Хващам/хвана балкана*. и не се среща както в езика на турците от България, така и в Турция. Авторът подменя турцизма *балкан* (balkan) с *кър* (kır), тъй като в сборника не се говори за някакъв балкан в околността на селото. Хасан Ефраимов не се задоволява само с приведените примери за фразеологични единици, съдържащи в състава си турцизми, а под влияние на езиковия си потенциал създава нови като *Давам курбан*. (3 пъти), който с известно изменение сътворява по аналогия на турския фразеологизъм *Коля курбан*. (kurban kesmek). Новосъздаденият фразеологизъм *С голямата баданарка*, без съответствие в турския език, също е използван един път в текста, принадлежащ на повествователя. В сборника се среща и сложна-

---

<sup>15</sup> От значение е фактът, че в турския език фраземи могат да се образуват от почти всички съществителни, а и от други части на речта, те се използват доста често в разговорния и художествения стил.

та номинация *курбан чорба*.<sup>16</sup>, създадена изцяло по модел на турските изафети и по-специално по аналогия на словосъчетанието *шкембе чорба* (*işkembe çorbası*).

Интересното в разказите е, че Хасан Ефраимов дава в превод някои турски фразеологизми, свързани с Исляма и поверията на мюсюлманите за кръговете на ада: *На седмото небе.*, *До седмата земя.* и *До седмият кат на небето.* (Ефраимов 2016: 33, 48), които са свързани с мъченията на седмия кръг на ада, независимо дали става въпрос за небето или под земята. По смисъл те са противоположни на доста близкия по форма български фразеологизъм *На седмото небе./На седмото небе съм.* (Чувствам се много доволен, щастлив.). Авторът е успял да предаде негативния им смисъл в контекста и така не допуска грешно възприемане на съдържанието. Наред с това писателят дава в буквален превод турския фразеологизъм *son yolculuğuna uğurlamak* като *Да изпратя в последния му път, означаващ участие в погребение.* Освен това използваното словосъчетание *Преди да мигна.* е превод на турския фразеологизъм *göz açıp karayıncaya kadar* със значение: *за много кратък срок/за много кратко време.* Именно тези примери красноречиво говорят, че Хасан Ефраимов търси специални изразни средства, с които да постигне такъв език, стил и изказ, които да не противоречат на националната и културна идентичност, ценностите и традициите на персонажите. Той се възползва и от една турска поговорка, съдържанието на която предава на български с кратко пояснение: “Имаме поговорка: *Змия, която не ме закача, 100 години да живее*” (Ефраимов 2016: 80). Така той набляга върху различието на културния колорит на делиорманския турчин.

Мястото, където се развиват събитията в разказите на сборника “Дервишки караконджул”, е едно делиорманско село – родно на разказвача, но неназовано по име. Авторът избягва да го спомене може би, за да не се ограничи пространствено и да бъде възприето като всяко възможно турско село в Делиорман. Вероятно е също да избягва споменаването на турския топоним, несъществуващ на географските карти, за да не дразни определени кръгове. Защото турското име на селото е скъпо на турскоговорящите му обитатели и то е предпочитано в ежедневно им общуване. За да предаде местния колорит, Хасан Ефраимов не елиминира турските наименования на някои местности, които натоварва със специални художествени

<sup>16</sup> В турската кухня няма ястие с такова име.

функции. Сред тях най-показателно е названието на топонима *Дервишиа*, който присъства почти в целия текст и е най-интересният географски обект в пространството на селото, мистичният фокус, където живеят *Дервишките караконджули*, които в лицето на *Али Курт* или като самостоятелни персонажи в края на повествованието вече са положително оцветени. В местността *Дервишиа* цъфтят подлудяващите с аромата си луди сливи/луди джанки<sup>17</sup> – *Дервишиа* е място страшно и свято, родно, делиорманско, част от България. То е и реално пространство, в което неговите синове, озоваващи се на края на света – в Америка, завещават да бъдат погребани. Наред с *Дервишиа*, неотменни части на селското пространство са и топонимите *Малката кория* и *Голямата кория* – доста разпространени в цяла България за означаване на местности и известни на голямата част от читателската аудитория. Турското название на град Констанца – *Кюстенджа* (Köstence), обяснено в бележка, звучи убедително в устата на близнаците Махмуд и Али, разказващи за участието си в сраженията с Румъния по време Първата световна война.

Изключително интересни са така наречените “говорещи имена” (Влахов, Флорин 1990: 232) и прякори на някои персонажи в сборника като *Али Курт* или *Курта*, *Байрам Яланджията* или *Яланджията* и красавицата *Дилек*. Ясно се откроява тяхната семантична натовареност, затова етимологията и скритата им символика не са за пренебрегване. Тъй като те са адресирани до цялата читателска публика в България, би трябвало по някакъв начин в контекста да се афишира значението им. Още във второто изречение на разказа “Караконджул” (Ефраимов 2016: 10) авторът обяснява смисъла на фамилията-прякор – по всяка вероятност даден на главния персонаж от селското мнозинство и принадлежащ към говорещите имена. Във второто, третото и четвъртото изречение са назовани някои характерни физически и душевни качества на персонажа, които са му приписани от злонамерените селяни. На базата на антитезата майсторски са сътворени имената на главния персонаж *Али Курт*, наричан още *Дервишки караконджул*: Майчиното му име е *Али* – име на мюсюлманския пророк, последовател на Мохамед и жертва на враговете си, а прякорът *Курт* – означава вълк, хищник. *Дервиш* на български означава мюсюлмански монах от религиозен орден, дока-

---

<sup>17</sup> Джанките в Делиорман на турски се наричат *deli erik* – луди сливи. Авторът прави изключително оригинален паралел между Делиорман и лудите сливи, а оттам създава асоциация за необузданите, буйни, луди обитатели на района.

то *караконджул* – зъл дух, страшилище. Главният герой *Али* наистина е духовно чист като дервиш, който непрекъснато се труди и грижи за децата си, но ходжата и селяните от кръчмата го смятат за вълк, за страшилище, защото е различен и не прилича на тях. Името и прякорът на *Байрам Яланджията* от разказа “Яланджията” също съдържат специална символика – и двете принадлежат към говорещите имена. Съдържанието на прякора *Яланджията* (Лъжеца) е дадено в бележка под линия, докато *Байрам* се обяснява в контекста. Целта на автора тук е да получи комична ситуация, давайки на персонажа си две взаимно изключващи се говорещи имена. Той е назован *Байрам*, понеже е роден на светия за мюсюлманите празник “Байрам”, а негативно характеризираният го прякор *Яланджията* е отражение на личностната му характеристика. Прякорът, който му е даден доста по-късно, измества святото родно име *Байрам*. Смишълът на женското говорещо име *Дилек* (Dilek-желание, копнеж, блян) от разказа “Принцесата на караконджула” не е обяснен, въпреки че има конкретно отношение към темата на разказа.

Двата центъра в реалното географско пространство на селото са джамията и кръчмата, които са противопоставени. Джамията е свещено и тихо място за молитва, в която дори злонамерените караконджули и шейтаните не смеят да влизат, сигурно скривалище за всички. Посещава се само от старци, които преди или след молитва по някогашна традиция неотменно седят на пъна пред джамията: “Седят на този пън, откак станах ходжа... Едни и същи... И по времето на баща ми са седели... И по времето на дядо... Сигурно седят там от основаването на света...” Антитеза на джамията е шумната кръчма, изместила традиционното пространство на кафенето – място за тихо и спокойно общуване, разказване на легенди, приказки. Борбата и полярността на обитателите на тези две пространства и най-вече на ходжата и пациентите на кръчмата позволяват на автора да постигне редица комични ситуации, към които се стреми. Защото ходжата не е безгрешен духовен водач на селото, а земен човек с доста слабости и грехове.

В сборника често се срещат повторенията *амин, амин, амин* (3 пъти), *Аллах, Аллах, Аллах* (2 пъти) или *Аллах, Аллах* (3 пъти), междуметието *въх...въх...въх* (vah, vah, vah). На две места е описан характерният за турците поведенчески жест за показване на чувство за съжаление и покаяние, който се изразява с удряне по коленете и който е послужил за възникване на фразеологизма: *dizini/dizlerini dövmeek*. Наред с това е предаден мюсюлманският обичай ходжата

преди погребването на мъртвия три пъти да пита присъстващите дали му прощават<sup>18</sup>.

Докторът на селото – един от главните персонажи и повествовател на повечето от разказите – е носител на същия език и е израсъл в същата среда. Но като интелгент, отдалечил се от нея за дълги години, той се оформя като културен хибрид, защото получава образование на български език, след основното си образование попада в чисто българска среда, опознава българската култура. Българският език е този, който владее и чувства по-добре от майчиния. Затова понякога несъзнателно дава място на думи като *шанс* (вместо по-подходящата *късмет*), християнски реалии от рода на *опявам*, *последно причастие*, *вечерна служба*, *кръщавам*, *кръстя*<sup>19</sup>, които не се вписват в турската езикова среда, противоречат на естественото речево общуване и ислямското мислене на персонажите.

Въпреки турската езикова среда, националният колорит, битът и мисленето, житейската философия на персонажите, като автор с различно разбиране за съвременното художествено слово и възприемането му от съвременния читател Хасан Ефраимов внимателно и с известна неувереност подхожда към езиковия потенциал на турцизмите. Това наше твърдение се потвърждава при бегло сравнение с турцизмите в романа на Свилен Капсъзов “Краят на потоците”, който предпочита тези езикови средства приблизително три пъти повече и почти не дава обяснения им в бележки под линия. Осезаем е стремежът на Капсъзов да ги вражда в повествованието си, за да внуши конкретната езикова ситуация, независимо дали ги използва за предаване на жаргонна, диалектна българска или турска езикова среда.

Като заключение трябва да се подчертае, че в дебютния си сборник “Дервишки караконджул” Хасан Ефраимов доста сполучливо се възползва от турцизмите, които съдържат голям емоциона-

---

<sup>18</sup> “Дошли сме да изпратим Али Курт в последния му път. (...)

– Прощавате ли му? – носеше се гласът на ходжата.

– Прощаваме му – отговаряхме ние.

– Прощавате ли му?

– Прощаваме му...

– Прощавате ли му?

– Прощаваме му...” (Ефраимов 2016: 26-27).

<sup>19</sup> Тези лексеми биха могли да се заменят с по-подходящи или описателно да се предаде значението им. Не звучи естествено в устата на ходжата сравнението: *Квичи като попско прасе по Коледа*.

лен потенциал, предоставят на автора невъобразими възможности за сполучливо предаване на естествената мюсюлманска среда и създаване на пълнокръвни герои-турци с култура и идентичност, различни от българските. Без семантичната натовареност и скритата символика на говорещите имена, на местните топоними, на турцизмите, реалиите и фразеологизмите с турска лексика, едва ли авторът би могъл да предаде на читателя интимността и непосредствеността на обстановката, да постигне образност на стила и да представи бита, естествения колорит, душевността, житейската философия на обитателите на делиорманското село, населено със светци и грешници, с призраци и живи селяни, споделящи чувства, радости и мъки, общи за всички хора по света.

### Библиография:

*Български етимологичен речник*, 2012, том II, второ издание, под ред. на Вл. Ив. Георгиев, Българска академия на науките, София. [Balgarski etimologichen rechnik, 2012]

**Бернщейн, Самуил Борисович. 1941.** “К изучению тюркизмов (турцизмов) в южнославянских языках”, с. 5-10. В: *Славянское и балканское языкознание. Язык в этнокультурном аспекте*, под ред. на Э. И. Зеленина, В. В. Усачева, Т. В. Цивьянин, Академия наук СССР, Москва. [Samuil Borisovich Bernshteyn, “K izucheniuyu tyurkizmov (turtsizmov) v yuzhnoslavyanskikh yazykakh”]

**Бодуен де Куртене, Иван Александрович. 1963.** *Избранные труды по общему языкознанию*, ч. I. Москва. [Ivan Aleksandrovich Boduynen de Kurtene, *Izbrannyye trudy po obshchemu yazykoznaniiyu*, ch. I].

**Везенков, Александър. 2010.** “Парадоксалната употреба на турцизми в разказа за българското”. В: *В търсене на българското: Мрежи на национална интимност (XIX-XXI век)*, Дечев, Стефан (ред.), София. [Aleksandar Vezenkov, “Paradoksalnata upotreba na turtsizmi v razkaza za balgarskoto”].

**Влахов, Сергей, Флорин, Сидер. 1990.** Непреводимото в превода, София. [Sergey Vlahov, Sider Florin, Nprevodimoto v prevoda].

**Ефраимов, Хасан. 2016.** Дервишкият караконджул, Силистра. [Hasan Efraimov, Dervishkiyat karakondzhul].

*Речник на българския език*, Институт за български език, <https://ibl.bas.bg/rbe/> [Rechnik na balgarskiya ezik, Institut za balgarski ezik].

**Капсъзов, Свилен. 1994.** Краят на потоците, София. [Svilen Kapsazov, Krayat na pototsite]

**Кирова, Людмила. 2012.** “За един модел на сложна номинация, проникнал с турки заемки, и неговото развитие в съвременния български език”. // Електронно списание LiterNet, 03.05.2002. [Lyudmila Kirova, “Za edin mmodel na slojnata nominatsiya, proniknal s turski zaemki, i negovoto razvitie v savremenniya balgarski ezik]. <<https://litenet.bg/publish3/lkirova/turski-izafeti.htm>> (28.03.2021).

*Фразеологичен речник на българския език, 1974-1975, том I-II, под ред. на К. Ничева, С. Спасова-Михайлова, Кр. Чолакова, Българска академия на науките, София. [Frazeologichen rechnik na balgarskiya ezik, 1974-1975, tom I-II].*

*Güncel Türkçe Sözlük, Türk Dil Kurumu, <https://sozluk.gov.tr/>*

DOI: <https://doi.org/10.37708/bf.swu.v30i2.20>

*Alaal Lateef Alnajm*  
*University of Kufa (Iraq)*  
[[alaal.alnajm@uokufa.edu.iq](mailto:alaal.alnajm@uokufa.edu.iq)]

## Multiculturalism: Identity, Language and Culture in Zadie Smith's *White Teeth*

**Abstract:** *This paper aims at examining the specific meaning of multiculturalism, identity, language and culture in Zadie Smith's *White Teeth*, her debut novel. Smith depicts a clear picture of the multicultural society of Britain in general and London in particular. However, the paper studies the ways in which Smith's novel transcends and promotes the limitations of black women. The study investigates how multicultural society of Britain drawn through the role of each character in the novel; therefore, it shows the complex construction of identity created by Smith to illustrate the relationship built by difference of race, language, and religion.*

*The paper also examines how Zadie Smith in her use of language integrates the linguistic process existed in the intercultural experiences of both the characters and the author herself.*

**Key words:** *White Teeth; Multiculturalism; identity; language.*

### Introduction

*White Teeth* is the first novel written by the young writer Zadie Smith in 2000. In her novel, Smith shows the role of identity and culture in the city of London; Smith promotes the cohesion and closed relationships between individuals inside society despite the multi-ethnicity and multicultural aspects.

The setting of the novel is London. Due to the high position of this multicultural city, Smith chooses it to be her point of discussion and negotiation between characters.

London has become the most diverse city in the world. It has become also the home of different immigrants from different nations worldwide.

Over the past decades, London has gained more significance and interest; immigrants have dwelt it. After World War II, England has become the land of immigrants especially London. A new multicultural



environment has been created by different religions, races, languages, and cultures; this has helped to co-exist a multicultural atmosphere inside the society of the city of London. For many reasons, immigrants have traveled to the United Kingdom to begin a new life and this promotes the harmony between different ethnic groups. Smith in her novel reveals the meaning of identity and culture in a multicultural society. She tells her reader to focus on who immigrants arrived in London for various reasons but they didn't lose their languages, traditions, and culture; in fact, these are the main sources or features of constructing their identity.

Michael Perfect mentions the position of multicultural society in London, he in more specifically adds: "London has not always been one of the most diverse cities in the world. Moreover, while it is crucial to point out that London has never been 'monocultural', this is not the same as saying that it has always been 'multicultural', and we must clarify what we mean by this extremely complicated, highly contested and often misunderstood term. One of the key strengths of the concept of multiculturalism is its pliability, and yet there is also a certain slipperiness to the term which can be extremely unhelpful. We could, for example, use 'multicultural' to refer to the coexistence of any groups of human beings who can be characterised as having differing beliefs, ideas, customs or social behaviours. As such, perhaps any society could be described as multicultural. This would, in turn, raise the question of whether any given group of human beings, however it is defined, can really be said to be without any such kinds of difference internally. If we proceed along such lines, there is an argument to be made that any three people gathered together in a room constitutes a multicultural. Indeed, if we were to accept such a definition of the term, it would be expanded to the point of meaninglessness" (Michael,4).

Actually, is not the only postcolonial novel but, it presents a very unique fictional story about the real meaning of the concept of multiculturalism. The novel depicts the society of London as one house without aroused problems. In general, multiculturalism means to respect all people's values in one society. Embracing all different kinds of diversity, richness in social, ethnic, economic, cultural, and political areas are the main purpose of multiculturalism. Clement Ball puts it: "Multiculturalism and multicultural structure in England, having become a postcolonial contact zone has brought about the integration of some issues such as nationality, race, identity, crisis, religious clashes hybridity and so forth" (Ball: 2004,15).

Zadie Smith was born to a British father and Jamaican mother. The successful marriage between her mother and her father reflected the shining picture of the writing of Smith; this was represented and embodied in the racial, religious and cultural relationship and experiences of immigrants as the third generation in her novel *White Teeth*. Laura Moss says: "Smith has created characters of mixed races, mixed cultures, and mixed languages; in short, she has created a portrait of hybridity in a North London borough"( Laura Moss: 2001,18). Exploring the integration process, identity, and culture are revealed by the different generations of the immigrants in the novel. However, this makes the history of London full of stories of immigrants.

### ***White Teeth***

Zadie Smith was born in North-West London,1975, her father was an English while her mother was a Jamaican. Her great writing is influenced by living in multicultural London. The characters she chose immigrated to London, however, they were aware of their postcolonial identities, this will affect their ethnic identities because of the multicultural society.

The youth of Zadie Smith and the quality of her work impressed critics; of what she has achieved during her undergraduate study. She was offered a contract by Hamish Hamilton for completing the novel based on the reading of the first chapter, she wrote the rest of it during her senior year at the University of Cambridge. O'Rourke describes Smith as an "impressive versatile prose stylist at ease with a variety of voices and breeds of urban slang, and in this and in her panoramic approach to multiculturalism she resembles Salman Rushdie, whose influence is obvious" (O'Rourke 2000: 166).

In fact, *White Teeth* has received a great account of praises by some critics; it gives an accurate description of the multicultural society, reality, and ethnic identity in the city of London: "Smith has allowed herself certain imaginative freedom"(Mullan 2000: 18). In her style of writing, Zadie Smith tries to portray thousands of things in the same manner which is found in comedies. James Wood refers to the *White Teeth's* style:" This style of writing is not to be faulted because it lacks reality - the usual charge against botched realism-but because it seems evasive of reality while borrowing from realism itself" (Wood 2001: 23).

England is a multicultural society. Lots of immigrants have traveled to Britain from different countries and nations. The main goal of their immigration is to improve the conditions of living. They expect to

get high opportunities; however, they faced many problems such as humiliation, poverty, misery and racism. Increasingly, the number of immigrants began to raise in Britain after the World War II.

In this respect, *White Teeth* reflects the oppression of immigrants who faced it during their state of being in Britain; it portrays what was imposed on the immigrants due to their ethnic identities. The background of the characters Smith chose is compatible to her cultural origin. She lives in a multicultural place; north London suburb of Willesden. Hence, she has the chance to experience the different cultural values of both English and Jamaican. Therefore, this was effectively very clear in depicting the portrayal of the conflict between cultural values of immigrants lived in Britain and those of who belonged to it.

Due to the difficulties immigrants have in Britain, Smith in her novel *White Teeth* shows their psychological and cultural conflicts; how they were treated in foreign country. Otherwise, some characters in the novel were humiliated because of their origin and culture. Actually they expect to get good jobs in multicultural society, but they experience nothing but humiliation.

In this respect, Smith always tries to draw a picture concerning the different cultures co-existence in multicultural society; she presents the suffering and misery of immigrants and how they must adapt to live in new circumstances in order to create a better life for them and for the next generation too.

Many problems have existed inside the multicultural society of Britain, therefore, this has created the cultural conflict between the minority groups coming from different cultures to live in the United Kingdom. *White Teeth*, in one way or another, shows to us the inequality and trauma of the immigrants when they chose Britain as a place to live in. (Easthope A.: 1999, 148)

Bruce King summarizes the work of Zadie Smith in her novel *White Teeth*: "This is a multicultural English novel, set in well-off north London, in which the three families are Muslim, half-Jamaican, and Jewish, and in which few non-minority characters appear; the Irish bar is run by a Muslim" (Bruce: 2001, 116).

In the following words, John Mullan expresses his feelings to talk about *White Teeth*, he begins: " *White Teeth* has satirical aspirations and some passages of unalloyed satire. These contribute to the sense that it is a novel whose picture of multi-cultural England has escaped obligations of political correctness. Its marginal characters are often satirically imagined types, their absurdity representative rather distinctive" (Mullan:

2002,118). Smith believes that people as individuals have the same goals and wishes; therefore, personality and the way of living are the main social issues to build up the hybridity in multicultural society exactly the multicultural London city.

In fact *White Teeth* goes around three families. The first one is the family of the Englishman Archibald Jones who meets the Bengali Samad Iqbal at army; gradually, Iqbal becomes a very closed friend to Archibald. However, they share common secrets. Race, religion and history are the main issues that make both Iqbal and Archibald think about.

*White Teeth* examines contemporary multicultural London. The characters speak different languages, from different race, and of different ages; they want to look world from different ways. The novel is not autobiography, due to her mixed-race family history, her setting relies on the childhood neighborhood of Willesden.

Zadie Smith successfully explores the complex interactions between different ethnicities that makes up contemporary British life to show different concepts and attitudes toward multiculturalism.

### **The concept of Identity in White Teeth**

Identity means "the collective aspects of the set of characteristics by which a thing is definitely recognizable or known" (web1). Identity makes person unique or distinctive. Writers sometimes construct their characters in different ways in order to create false or ambiguous identity; however the concept of identity is problematic one. Identity is a strong theoretical concept that makes person's behavior quietly different from others. Self-perception and social presentation determine person's identity; how he/she behaves within society.

Specific identification has been brought by the multicultural world; and this will lead to danger of loss of identity as an ethnic group or person. A national identity is inside the multiplicity of identities, it seems to make people live in one place together in order to create a nation. Anthony D. Smith defines nation as "a named human population sharing an historic, territory, common myths and historical memories, a mass public culture, a common economy and common legal rights and duties for all members" (Anthony D. Smith: 1996,14). Therefore common language and territory are the main features of a nation.

The complex construct of identity In Zadie Smith's *White Teeth* requires to take a look at the most important definition of cultural identity by Stuart Hall, he says: "Common historical experiences and shared

cultural codes which provide us as, 'one people', with stable unchanging and continuous frames of reference and meaning, beneath the shifting divisions of vicissitudes of our actual history"(Hall:1989,227).

*White Teeth* explores the influence of Zadie Smith in the tragedy of the Indian Mutiny in 1857; however, she uses the same technique and literary devices used by the first generation of writers who wrote during the time of colonialism to satirize the policy of the British imperialism. Smith embodies the struggle of the third generation of immigrants in her central character Samad, he is repeated compulsively to tell the story of his grandfather and what he did against the British colonization. Therefore, Smith believes that the multicultural identity in Britain plays very important role in building society of different cultures, religions and languages.

In addition to displaying the characters in very specific way in her novel *White Teeth*, Smith succeeded to bring two different nations and religions throughout the closed relationship between Samad, a Bengali Muslim, and Archie, a British Christian; greatly, they served at the British army during the World War II, Smith states: "The whole of the steamy Indian summer of 1857, the whole of that year of mutiny and massacre would be hauled into O'Connell's and brought to semi-consciousness by these two makeshift historians" (Smith:2000,218).

### **Multiculturalism in *White Teeth***

The set of state of policy of multiculturalism advances tolerance and advocates the recognition of cultural diversity. Historically, Britain is the race of relations approach to equality (Favell: 2001,). However, the best framework for dealing with cultural diversity and difference, multiculturalism is adopted for these tasks. Over the past few decades, the British political discourse has adopted multiculturalism as a key term. It is very necessary in plural society to have new knowledge of identity among multiculturalism for making educational and political decisions. Social science disciplines, including psychology, anthropology, political philosophy and sociology studied the term of multiculturalism; therefore, it is a debated concept (Hall: 2000,). Since the Roman empires, managing the inter-cultural relationships have been the political realities; therefore, multiculturalism is as old as humanity (Vertovec: 2010,).

Arends-Toth and Van de Vijver, 2002, 2003, Berry and Kalin, 1995, 2002, Chryssochoo, 2002, Ginges and Cairns,2002, Ho 1990 and others are psychologists who defined multiculturalism in their psychological perspectives. They think that multiculturalism is an

ideology for accepting the cultural diversity by both immigrants and people of the host country. (Arends-Toth and Van de Vijver, 2002, 2003, Berry and Kalin, 1995, 2002). Berry is a social-psychologist who tackled the ideology of multiculturalism; however, he believes that multiculturalism maintains the culture of the multicultural society; it also strengthens their role in maintaining the values of society (Berry 2001).

The main goal of multiculturalism is to create peaceful atmosphere between two or more groups; it stands up against any kind of conflict. Multiculturalism means to co-exist society from different culture, language, tradition and religion within one community.

Society of multi-cultures provides sense of freedom and air; this will build the main stem of living peacefully. The influence of cultures produce positive issues in the life of people particularly in arts, music, sport and style of living; this brings new ideas and wave of inspiration. Some sociologists believe that the influence of cultures of multicultural society will create conflict or tension.

Two generations of immigrants have tackled by Zadie Smith's *White Teeth*; it successfully displays the flaws of the relationship of the immigrants-native to produce an alienated individual and to strengthen their social fabric. Each character in the novel represents cultural extreme in a unique way. The relationship in multicultural London shows how brilliantly the immigrants lived and interact to reflect their values and traditions.

Clearly multiculturalism presents the cultural diversity and tolerance inside multicultural society. England is the home of multicultural values and identities. Multiculturalism in *White Teeth* accepts the mixing of ethnicity inside the society at the level of individual rather than nation; however, it focuses on the idea that each of us is multicultural and this will lead us to the multiethnicity. The character Irie Jones becomes completely the symbol of this kind of multiethnicity throughout different texts in the novel.

Comedy is the main mode of Zadie Smith's *White Teeth*; effectively relying on the style and form of Horatian satire; however, the novel deals with the moral dimensions of society particularly hypocrisy, foibles and expedencies of the major characters. Therefore, Smith is influenced mainly by E.M. Forster, she uses literary devices pertaining the traditional English literature that shows her style powerful and unique. Multicultural subject matter of the text is associated with the other modes that show how Smith takes in her account the English tradition of literature.

### Language in *White Teeth*

In postcolonial novel, language plays an important role in examining the problems of identity and culture; however, this will affect the life of newcomers and immigrants. In order to look for what the contribute of characters in novels of postcolonial literature, we must study the accent, grammar, syntax and semantics in writing such novels like Zadie Smith's *White Teeth*. For example, the majority of characters speak the same words of the original English speaker. George Lamming says: "English is a West Indies language" (George: 1960,44). Novels of multicultural London are traditional linguistic in which they focus on the question of mental deconolization; the writers of these novels do not include the standard British English. Therefore, the linguistic process that exists in the intercultural experiences and human relations is the main attention drawn by the post colonial writers particularly in multicultural novels of Britain (Susheila:1995,48).

Zadie Smith in her novel informs us that the multiplicity of tongues discover the interlinguistic forms; in other word, the difficulties arising from the linguistic pluralism are the main concerns of writing in the multicultural society. Cynthia James says: "Language as battleground on which British and West India cultures and identities clash and make accommodations" (Cynthia:2007,8).

Janet Wilson and Chris Ringrose in their research discussed the issue of language in *White Teeth*; they present: "*White Teeth* is a polyphonic novel, integrating dozens of different voices. The major yarns in its fabric are Bengali English, Jamaican patois and north London slang, three language varieties that surface in the morphology, lexicon, syntax, and phonology adopted by the characters" (Janet and Cris:2016,82). A survey of linguistic landscape of London after World War II is provided successfully by the novel *White Teeth*.

As major instrument and narrative strategy, *White Teeth* is a plot-driven novel; it conveys the cultural plurality of the postwar London. We see that the novel depicts a picture of the multicultural society of London; it resembles of the city of Babel in Iraq in which its people speak different languages in cultural diversity.

One of the most significant use of language is that it defines what the human relationship is. However, *White Teeth* studies stylistically the features of narrative particularly its simile. The novel itself contributes through its focus on language on the reflection of what it means to be English.

Smith provides language as a method of multicultural and religious space for example, she gives some kind of translation through the speak of her characters; however, she writes: "O Allah, I seek refuge in you from the evil of my hearing, of my sight, of my tongue, of my heart, and of my private parts" (Smith 116). Di Martino and Di Sabato discuss how in some ways translation can be negotiation of immigrants identity: "What has perhaps not been duly considered is the sometimes totally different linguistic cartographies that practices of translation trace when compared to the mappings sketched in source texts and, consequently, the extent to which they actually reveal the continuous negotiation of space and identities characterising such linguistically rich and sophisticated novels as *White Teeth*" (Di Martino and Di Sabato 100).

### Conclusion

*White Teeth* is a novel concerning the multicultural society in Britain particularly the city of London. Brilliantly, Zadie Smith creates her characters, from different cultures, races,

languages and of different ages. However, Smith shows the multicultural history of London in more realistic way; she successfully brings all the families in the story together.

*White Teeth* is a contemporary work of fiction; it is self-consciously working in a tradition of the English novel. However, it combines both the formal techniques and thematic contents to articulate and explore different discourses of multiculturalism. Therefore, we have seen that the novel in its own style and technique used the re-evaluation assumed and inherited in forming the multicultural society. Effectively, the novel's text has the cultural eagerness attached to construct the multicultural identity; however, it is not an easy one, therefore it is required more realization and accuracy. Smith highlights the reality of living in postmodern world; she also makes her characters interact with each other as they live exactly the real meaning of life. Therefore, her runaway success pushed the young writer to the central mainstream of attention.

Specifically, the different perspectives of postmodernists have been embraced by the work of Zadie Smith's *White Teeth*; however, her unique works deform the traditional understanding of our world by focusing on religions, languages, race and history of what people think about their lives. The novel has a great impact in the life of English people in which it received a whirlwind reception; it is considered the multicultural voice of England. *Time Magazine* describes *White Teeth* as: "the



first novel ever written that truly feels at home in our borderless, globalized, intermarried, post-colonial age”(16 October, 2005).

In his essay, Dominic Head remarks: “Zadie Smith’s *White Teeth*: multiculturalism for the millennium. On the jacket of the first hardback edition of *White Teeth* (2000) the photograph of Zadie Smith is intended to give out several unmistakable signals. The bespectacled and studious writer, the publisher is telling us, has achieved a level of maturity of vision that is unusual for someone in her twenties. But we also note, if only subliminally, the Afro hairstyle, and the complexion that betokens a mixed race identity. These details become worth remarking upon with the publication of the paperback edition a year later. Now the author has lost her glasses and sports long, straight, dark hair – (...) Smith now has an Asian look, and this demonstrates an indeterminate ethnicity” (Head, 2003,106).

However, we can say that *White Teeth* through put its characters, language, and style can change the way of life in unexpected and surprising ways; the novel deals with wide range of issues including race, religion, culture and tradition. Therefore, the great account of themes makes the novel difficult and compelling.

Anton Pokrivčák says:”*White Teeth* may be added to the large number of contemporary British books which seek to address the perplexing reality of multicultural societies. The text abounds with examples of confusion, a sense of exile and alienation which manifest Smith’s lingering awareness of the perturbation of immigrant communities. Yet, at the same time, the novel also displays the germination of a new era” (Anton: 2010,65).

### **Bibliography:**

**Allport, Gordon Willard. 1954.** The Nature of Prejudice, Cambridge, MA: Perseus Books.

**Anthony Easthope. 1999.** Englishness and National Culture. London and NewYork: Routledge.

**Anderson, B. 1983/1991.** Imagined Communities: Reflections on the Origin and Spread of Nationalism. London: Verso.

**Arends-To’th, Judit & Van de Vijver, Fons J. R. 2003.** “Multiculturalism and acculturation: Views of Dutch and Turkish-Dutch” in European Journal of Social Psychology.

**Auer, P. (ed.). 1998.** Code-switching in Conversation. Language, Interaction and Identity. London: Routledge.

**Bakhtin, M. 1981.** The Dialogic Imagination. Austin, TX: University of Texas Press.

- Ball, John Clement. 2004.** *Imagining London: Postcolonial Fiction and the Transnational Metropolis.* Toronto; Buffalo: University of Toronto Press.
- Bhabha, H. 1994.** *The Location of Culture.* London/New York: Routledge.
- Bhatia, Sunil & Ram, Anjali. 2004.** "Culture, hybridity, and the dialogical self: Cases from the South Asian diaspora" in *Mind, Culture, and Activity.*
- Bourdieu, P. 1991.** *Language and Symbolic Power.* Cambridge: Polity Press.
- Brinker-Gabler, G. and S. Smith (eds.). 1997.** *Writing New Identities. Gender, Nation, and Immigration in Contemporary Europe.* Minneapolis and London: Univ. of Minnesota Press.
- Brockmeier, J. and D. Carbaugh. 2001.** *Narrative and Identity: Studies in Autobiography, Self and Culture.* Amsterdam: Benjamins.
- Calhoun, C. 1995.** *Critical Social Theory: Culture, History, and the Challenge of Difference.* Blackwell. NFR proposal: *Language, Culture and Identity 2008 – 2011.*
- Cameron, D., E. Frazer, P. Harvey, M. B. H. Rampton, and K. Richardson. 1992.** *Researching Language: Issues of Power and Method.* London: Routledge.
- Cameron, L. (In press).** *Patterns of metaphor use in reconciliation talk. Discourse and Society.*
- Clifford, J. 1997.** *Routes: Travel and Translation in the Late Twentieth Century.* Harvard University Press, Cambridge, Mass.
- Coupland, N. 2001.** Introduction: Sociolinguistic theory and social theory. In Coupland, N., S. Sarangi and C.
- Candlin (eds.). 2001.** *Sociolinguistics and Social Theory.* London: Longman.
- De Fina, A. 2003.** *Identity in Narrative: A Study of Immigrant Discourse.* Amsterdam: John Benjamins.
- Di Martino, Emilia, Di Sabato, Bruna. 2014.** *Studying Language through Literature: An Old Perspective Revisited and Something More.* Newcastle upon Tyne: Cambridge Scholars Publishing.
- Dominic Head. 2003.** *Contemporary British Fiction.* Cambridge: Polity Press.
- Duveen, Gerard, & Lloyd, Barbara. 1986.** "The significance of social identities" in *British Journal of Social Psychology.*
- Fairclough, N. 1995.** *Critical Discourse Analysis. The Critical Study of Language.* London: Longman.
- Favell, Adrian. 2001.** *Philosophies of Integration. Immigration and the Idea of Citizenship in France and Britain (second ed.),* New York: Palgrave in association with Centre for Research in Ethnic Relations, University of Warwick.
- Gibbs, R. 1994.** *The Poetics of Mind: Figurative Thought, Language and Understanding.* Cambridge: CUP.
- Hall, Stuart. 2000.** "Conclusion: The multicultural question", in B. Hesse (Ed.), *Unsettled Multiculturalisms: Diasporas, Entanglements, Transruptions,* London: Zed Books.
- Halpern, C. and Ruano-Borbalan (eds.). 2004.** *Identité(s). L'individu, le groupe, la société.* Sciences Humaines Éditions.
- Harré, R. and L. Langenhove. 1999.** *Positioning Theory.* Oxford: Blackwell.
- Howarth, Caroline. 2009.** "I hope we won't have to understand racism one day': Researching or reproducing 'race' in social psychological research?" in *British journal of social psychology.*
- Hutchby, I. and R. Wooffitt. 1998.** *Conversation Analysis. Principles, Practice and Applications.* Cambridge: Polity Press.

**Ireland, S. and P. Proulx (eds.). 2001.** Immigrant Narratives in Contemporary France. Greenwood Press.

James, Cynthia. "You'll Soon Get Used to Our Language': Language, Parody and West Indian Identity in Andrea Levy's *Small Island*," *Anthurium: A Caribbean Studies Journal* 5.1 (Spring 2007), [http://anthurium.miami.edu/volume\\_5/issue\\_1/james-language.html](http://anthurium.miami.edu/volume_5/issue_1/james-language.html) (accessed 24 November 2019)

**Janet Wilson and Chris Ringrose. 2016.** *New Soundings in Postcolonial Writing: Critical and Creative Contours*. Leiden and Boston: Brill/Rodopi.

**Joseph, J. E. 2004.** *Language and Identity. National, Ethnic, Religious*. London: Palgrave Macmillan.

**King, Bruce. 2001.** "Review." *World Literature Today*, Vol. 75, No. 1, pp. 116-117.

**Kongslien, I. 2005.** New narratives in Norwegian and Nordic multicultural literature, or "Rewriting what it means to be Norwegian". *Scandinavica*, 44 (2): 143 – 162.

-----, 2007. New voices, new themes, new perspectives. *Contemporary Scandinavian multicultural literature. Scandinavian Studies*, 2.

**Labov, W. 1972.** The transformation of experience in narrative syntax. In *Language in the Inner City*. Philadelphia: University of Pennsylvania Press, 354 – 396.

-----, 1997. Some further steps in narrative analysis. *Journal of Narrative and Life History*.

**Lakoff, G. and M. Johnson. 1980.** *Metaphors We Live By*. Chicago: University of Chicago Press.

-----, and M. Johnson. 1999. *Philosophy in the Flesh*. New York: Basic Books.

**Lamming, George. 1960.** *The Pleasures of Exile*. (1960; London & New York: Allison & Busby, 1984)

**MacDonald, S. 2003.** Museums, national, postnational and transcultural identities. *Museum and Society*, 1(1) 1-16.

**Lanza, E. and B. A. Svendsen.** In press. Tell me who your friends are and I might be able to tell you what language(s) you speak: Social network analysis, multilingualism and identity. *International Journal of Bilingualism*.

**Mendoza-Denton, N. 2002.** Language and identity. In Chambers, J.K., P. Trudgill, and N. Schilling-Estes (eds.), *The Handbook of Language Variation and Change*. Oxford: Blackwell.

**Michael, Perfect. 2016.** *Contemporary Multicultural Fictions*. Palgrave Macmillan.

**Modood, Tariq. 2005.** Moderate secularism, religion as identity and respect for religion in *Political Quarterly*.

**Moss, Laura. 2001.** "The Politics Everyday Hybridity: Zadie Smith's *White Teeth*." *Wasafiri* 18.39 (2003):11-17 print. *Nation*. Encarta Encyclopedia. Microsoft Cooperation.

**Mullan, J. 2002.** "After Post-Colonialism." *The Guardian*.  
<http://books.guardian.co.uk/print/0,,4521793-110738,00.html>.

**Muller, G. 1999.** *New Strangers in Paradise. The Immigrant Experience and Contemporary American Fiction*. Lexington: The University of Kentucky Press.

**Naguib, S. 2004.** From temple to information centre. New perspectives on the role of museums in the 21st century. In *Bulletin of the Egyptian Museum* 1:55 – 60.

---

**Nasta, Susheila. 1995.** Setting up Home in a City of Words: Sam Selvon's London Novels, in *Other Britain, Other British: Contemporary Multicultural Fiction*, ed. A. Robert Lee, London: Pluto.

**O'Rourke, M. 2000.** "Fiction in Review." *The Yale Review* 88, 3: 159-170.

**Pokrivčá, Anton. 2010.** *Literature and Culture*. UKF Nitra, Slovak.

**Smith, Zadie. 2000.** *White Teeth: A Novel*. New York: Random House, Amazon Kindl.

**Vertovec, Steven & Wessendorf, Susanne. 2010.** *The Multiculturalism Backlash: European Discourses, Policies and Practices*, London: Routledge.

**Wood, James. 2000.** "Human, All Too Inhuman: The Smallness of the 'Big' Novel." Review of *White Teeth*, by Zadie Smith. *The New Republic*.

[www.blogs.sed.qmul.ac.uk](http://www.blogs.sed.qmul.ac.uk)

*Manuchar Loria*  
*Batumi Shota Rustaveli State University (Georgia)*  
[mloria@bsu.edu.ge]

## **Regional Studies in Soviet Georgian Ethnography after World War II (Field Development Tendencies and Visual Anthropology, Women Scientists)**

**Abstract:** *The present paper deals with the analysis of the Soviet ideological approaches, related with ethnology development, therefore the research covers two following directions: 1. The research of the importance of ethnological film-making, covering religious and ethnocultural values of Georgia and its neighboring countries. The first scientific-research expedition to the mountainous Georgia, supported with film-making equipment in Georgia, was implemented in 1960. Different films, featuring historical monuments or episodes or displaying material and spiritual lifestyle, which had already been filmed in Georgia before, were characterized with the total lack of the main features of ethnographical films. For example, the authors had been never applied preliminarily planned and staged scenes. Accordingly, a special attention shall be paid on Mirian Khutsishvili's activity, who acted as the ethnologist and an effective a camera man at the same time. 2. The analysis of activity of two key women scientists, involved in ethnographical research - Vera Bardavelidze, whose scientific work was related with the study of everyday lifestyle of Georgian people and Nino Brailashvili, who made a great contribution in creation of ethnographical sketches.*

**Key words:** *ethnography; cinema; tradition; visual anthropology; women scientists.*

### **Introduction**

The presented paper incorporates the introduction, two topical directions and conclusion. A wide range of works, ethnographic films and albums were used and analysed within the frames of the research. The chronological frame of the research covers the post World War II period of Soviet Georgia. The research is focused on two topics presented below. Accordingly, the first part of the paper deals with Georgian ethnographic films created in Soviet Georgia, appropriate museum sphere and Mirian Khutsishvili's activity.

Thus, ethnographic film “Shrovetide in Georgia” presents an important ethnographic source. It shall be noted, that Berikaoba-Keenoba is an agrarian holiday (lasting for several days and containing different episodes), related with recovery of nature and agrarian cult. Berikaoba belongs to shrovetide customs. The holiday was established and created by the farmers and accordingly is related with archaic cosmogonical concept of constantly renewing nature. It shall also be noted that shrovetide carnivals were performed in many European countries. Thus, Berikaoba-Keenoba is a holiday especially important for Georgia, presenting different folk ethnographic visual signs and features, kept in spring carnival and important for ethnographic research.

The second part of the paper deals with analysis of the contribution of women scientists, involved into ethnographic researches, presented by Nino Brailashvili’s album “I remember Georgia in such way, ethnographic sketches” (Tbilisi 1999), depicting diversity of Georgian spiritual and material culture and Vera Bardavelidze’s contribution to establishment and development of Georgian ethnographic school. V. Bardavelidze’s works are dedicated to the issues of social-economic development of Georgia and the issues of spiritual culture (astral faith-beliefs, godhood pantheon, cults and rituals related with fertility-reproduction, calendar of Georgian Folk Holidays, folk ornament, cult graphic art and many other similar issues).

### **Georgian ethnographic films, created in Soviet Georgia**

Soviet ideological approaches related to ethnology development are analysed in a given work and the issues are grouped into two directions:

The first one deals with the importance of ethnological film creation (in a process of studying of religious and ethnocultural values in Georgia and neighboring countries) and propaganda functions of such films. The first scientific-research expedition to the mountainous Georgia, supported with film-making equipment in Georgia, was implemented in 1960. Different films, featuring historical monuments or episodes or displaying material and spiritual lifestyle, which had already been filmed in Georgia before, were characterized with the total lack of the main features of ethnographical films. For example, the authors had been never applied preliminarily planned and staged scenes. Accordingly, a special attention shall be paid on Mirian Khutsishvili’s activity, who acted as the ethnologist and an effective a camera man at the same time.

Mirian Khutsishvili was the head of Atheism department of Janashia State Museum (further rebuilt into division of History of religion).

In 1987-1991 he participated in numerous film festivals on ethnography and scientific conferences. The museum made a lot of expeditions within Georgia and other regions of Caucasus since 1960, aimed at research resulted in about 300 hour unique documentary film material – dealing with cultural heritage of various regions of Georgia, as well as Dagestan, Chechnya-Ingushetia, Kabardino-Balkaria and Osetia.

The materials preserved in the ethnographic film collection of the national museum can be divided into three groups - ethnographic documentary films with applied sound-tracks: “Pshavi, “Tusheti”, “Khevsureti”, “Mtiulet-Gudamaqari”, “Along the route of the Transcaucasian Railway”, “Shrovetide in Georgia, “Georgians in Iran, “Along the River Kura, “Gelati”, “Georgian Museum”, “Gurian Riders of the Wild West”, “Racha-Lechkhumi; raw film materials, without applied sound-tracks: “Svaneti, “Kakheti, “Kartli, “Tianeti, “The Lashari Shrine of Tianeti, “Samtskhe-Javakheti, “Samegrelo, “ “Abkhazeti”, “Saingilo, “Dagestan”, “Chechen –Ingusheti”, “Ossetia, “Ingusheti”; footage, shot by the cameramen Sobol in Khevsureti and Svaneti (Gotsiridze 2006,18-19; 61).

A major theme of the ethnographic footage in the National Museum archives displays the traditional culture (especially shrines and rituals) of the Georgian highlands. The choice of the topic of the footage was determined with the response to the rapid cultural changes and loss of traditional practices undergone by highland Georgian communities. It could be noted, that visual documentation helped to preserve these traditional cultural features for future generations, since many of material monuments and cultural practices, filmed during last 40 years, disappeared. In conclusion, the ethnographic films and materials preserved in the Visual Anthropology Collection of the Georgian State Museum have a considerable scientific importance and present an important source for all experts and specialists, interested in Georgian cultural heritage. The collection is especially important due to the dramatic changes undergone by the traditional cultures of the Caucasus in the Soviet and post-Soviet periods. The study of a number of unfortunately disappeared elements of these cultures will be greatly supported with visual documentation preserved in the museum’s collection (Gotsiridze 2006, 20).

Therefore, we’ll discuss Georgian folk holidays and habits displayed in film “Shrovetide in Georgia”. The film “Shrovetide in Georgia” is performed in black-and-white format, duration is 30 minutes, made in 1986–1988 and edited in 1990. Mirian Khutsishvili, Candidate of Historical Sciences perform Scriptwriting of the film (Film - SHROVETIDE IN GEORGIA,1990; Gotsiridze 2006, 35). Prior the direct discussion of

the film, it shall be noted that Shrovetide carnivals were conducted almost in all European countries: Greece, Spain, Belgium, Holland, Balkan countries, Czechia, France, etc. (Kalendarnie obic'ai I obradi v stranax Zarubejnoi Evropi Istoricheskie korni I razvitie obichaev, 1983). Despite the local peculiarities, holiday's story line, stages, purpose and attributes are common for all nations: persons in masks, visiting and blessing the families, irrepressible joy, cult songs and perkhuli dance, fallic-erotic rituals, zoomorphic persons, scenes of ritual death-rebirth, reflecting symbolic death-rebirth of nature, etc. A wide range of further religious or historical events impacted this ancient ritual and changed the archetype. Thus, during the centuries, the holiday was pulled away from its original image, currently kept it in the fragments. Study of the genesis of the holiday establishes a great basis for research, comparison and analysis of all details of this archaic ritual, kept in culture of different people. Therefore, visual data, describing Spring carnival may play the most important role for the research. Berikaoba-Keenoba holiday is in organic link between world folk mythology and the ritual practices. At the same time, it also has some individual, specific features, characterizing Georgian reality.

The film shows an ancient Georgian festival, celebrated at the villages of Ude, Vale, Patara Chailuri (Sagarejo district) and Matani (Akhmeta district). Georgian Shrovetide festival was usually held in the early spring, during the week, preceding Christian Lent (known as "Cheese Week" in Georgian). Shrovetide has pagan origin. However, it was not repressed by the church and was incorporated into the Easter cycle of the Orthodox calendar. A carnival-like festival, called **berikaoba** or **keenoba**, takes place during Shrovetide week in Georgia. A ritual was carried out on each day of the week, intended to see winter off and welcome a new farming year. While a number of folk festivals have forever been forgotten, **berikaoba-keenoba** survived in Georgian custom for a long time, doubtless due to its popular theatrical nature. The film shows how modern life merges organically with traditional cultural elements – how the participants of the festival try to accommodate archaic customs with modernity, in keeping with the reality of their lives (Gotsiridze 2006, 35). The film shows the aims and tasks of the holiday, dressing of participants, rule of selection of persons participating in the ceremony, ritual development, dance and game, ceremonies, related with the harvest and bride. The film also correctly notes that currently the ritual has no sacral meaning and it became folk performance. The film also broadly presents theatrical performances, restling scenes and totem ritu-



als related with them (Film - SHROVETIDE IN GEORGIA, 1990; Gotsiridze 2006, 35).

Generally, the first notes about this holiday were published in Georgian periodic press in 19 century. Newspapers and magazines of the period keep a lot of interesting photos and sketches. An interesting research “Rebirth of natural forces in Georgian folk holidays” by Julieta Rukhadze, a prominent female ethnologist is especially important in this sense (Rukhadze 1999).

**Picture 1 picture 2**



**Picture 3<sup>1</sup>**



### **Women scientists in Georgian Ethnographic research**

Nino Brailashvili's and Vera Bardavelidze's scientific heritage is analysed. Biographic data of several prominent Georgian ethnologists

---

<sup>1</sup> Picture 1, picture 2, and picture 3 – shots from Film – “Shrovetide in Georgia”, 1990.

(Rusudan Kharazi, Julieta Rukhadze and Tina Ochiauri) are also briefly presented.

### **Nino Brailashvili (1899-1991)**

Nino Brailashvili's album "I remember Georgia in such way, ethnographic sketches" is especially important for visual data analysis (Brailashvili 1990). The album presents all branches of Georgian folk art and data is distributed according to historical Georgian provinces (Svaneti, Khevsureti, Racha, etc.) and geographic signs (Western and Eastern Georgia). The album contains about 280 coloured and black and white illustrations, field diaries, sketches and records, including memoirs part, the texts are presented in Georgian, Russian and English languages (Brailashvili 1994, 10).

Academician Giorgi Chitaia, the founder of Georgian ethnographic school and J. Rukhadze, noted the extraordinary importance of the album "Nino Brailashvili's "ethnographic notebooks" published in 1964, at the Moscow international congress for ethnology and anthropology. Having won the recognition at home and abroad, they represent bibliographic rarities. This is the reason for the present publication of this album. Its importance for the history of the country is immeasurably great and the artistic execution of materials needs no further comment. The works speak for themselves" (Brailashvili 1990, 15). From 1930 Nino Brailashvili held a position of artist at the Institute of History, Archeology and Ethnography of Academy of Sciences of Georgia and Ethnography Department of Georgian Museum named after S. Janashia (Brailashvili N. Biographical Dictionary, National Parliamentary Library of Georgia.<sup>2</sup>

Nino Brailashvili, being a graphic artist from 1930-1940s, fixed important ethnographic elements in her drawings. Her skill to record an every-day object artistically, to show the object's links, to classify the material, to show the source of its form and development, made Nina Brailashvili's works indispensable for ethnographers. She maintained close contact with them, always participated in their expeditions to various historic provinces of Georgia (Svaneti, Khevsureti, Imereti, Guria, Samegrelo, Kakheti, Kartli and even Daghestan). N. P. Brailashvili worked as an artist for over thirty years. She designed all the exhibitions during this period ("Carpets and Rugs", 1939; "Folk Embroidery and Needlework", 1940; "Georgian Woodcarving", 1941; "Arms and Weap-

---

<sup>2</sup> <http://www.nplg.gov.ge/bios/en/00002841/>

ons", 1942; "Life in Georgia: the Old and New", 1952; and others)... (Brailashvili 1990,13).

Nino Brailashvili talent was positively influenced by her collaboration with the ethnographers. Being deeply interested in everyday life and culture, several times she travelled to different parts of Georgia. Thus, her art was based on folk sources. All her pictures of Svanetian towers or houses, with traditional furniture, dresses produced in Racha or in Khevsureti, Megrelian or Imeretian chokha-akhalukhi and papanaki, Gurian, Kartli-Kakhetian females – are characterized with folk character and traditions (Rukhadze 1994,8). So we'll discuss a sketch – "Georgian folk architecture", made in 1950s by watercolour and pencil on paper, size – 30x 25.8 cm. The picture displays the main types of Georgian dwelling (A - their section and B - ground plans) constructions, covering the range from the most primitive houses up to urban ones.

1. A lean-to for sheep-breeders in the mountains, it can't be considered as specifically eastern or western element, it is a general type of a shelter for shepherds.

2. Wickered patskha, typical for West Georgian lowland regions of Samegrelo and Abkhazeti, with a conical roof.

3. Kor - a Svanetian dwelling house with an accompanying defensive tower.

4. A house tower of mountainous Racha (a region adjacent to Svaneti). It also belongs to the type of dwelling construction where the people, stores of food and forage present an integrated single complex with vertically arranged living and utility spaces.

5. A Khevsurian house in the mountainous part of Eastern Georgia shows three-storeyed stone structure, arranged with dry masonry method of several tiers arrangement, providing a compact and rational space for people and animals.

6. An Ajarian house built of conifer-tree logs, the ground floor is intended for cattle. The living storey can be reached by walking up a planking. The hearth is in the centre, of the construction, a hole in the roof is used instead of a flue.

7. A Megrelian (Western Georgia) oda – a wooden house, constructed on stone posts, utility spaces are traditionally separately located, but sometimes khula (a space to preserve dry fruit) was placed inside a house. A balcony decorates a facade. Drinking water is brought from a well.

8. Darbazi - a peasant house typical for Eastern Georgia widely spread in ancient Kartli. All the living quarters and utility spaces are arranged horizontally under one roof in darbazi.

9. An urban house in Tbilisi. Typically, two-storeyed, balcony equipped houses with an inner yard. The roof is partly tiled and partly covered with tin sheets. The windows and doors are decorated with white framings in the Empire style. (Brailashvili 1990,257. See picture 4).

The analysis of Georgian architectural-ethnographic data makes it clear that dwelling spaces peculiarities differ from each other due to geographic zones. Geographic environment impacted upon Georgian folk everyday and industrial lifestyles and spiritual culture. Ethnographic researches, conducted in Georgian industrial-cultural direction, distinguish three regions: lowland of Western Georgia (dwelling construction with wattle walls - patskha, oda-house), lowland of Eastern Georgia (darbazi) and Mountaneous Georgia (Towers-dwelling constructions, cupola-type dwelling construction complex). Features of planning, construction material and roofing are taken as topological classification of traditional Georgian house (Kaldani 1990,9-20). All these ethnological details are in details described in N. Brailashvili's sketches.

The importance of Nino Brailashvili's sketches is proved by their active and broad application in the works of the following authors: Chitaya G. "Ploughing Tools of Georgia" (1939); Chitaya G. "Goldsmith's Art of Georgia", (1940); Bardavelidze V. "Among the Iori Pshavis (Diary)" (1941); Bedukadze S. "Stone-working in Mtiuleti" (1951); Bardavelidze V. "Items of Georgian (Svanian) Ritual Graphic Art" (1953); Bochorishvili L. "Women's Headgear in Tsalka" (1956); Bochorishvili L. "From the Historical Ethnography of Lower Kartli. Tombstones" (1956); Gegeshidze M. "Georgian Vehicles" (1956); Bardavelidze V. "Most Ancient Georgian Religious Faiths and Ritual Graphic art of Georgian Tribes" (1957); Rekhviashvili N. "Mining and Jet-stone Working in Georgia" (1957); Brailashvili N. "Women's Costume in Mountainous Racha" (1959); Bedukadze S. "Water Mills in the Aragvy Gorge" (1960); "Peoples of the World" (1962); Kharadze R. Robikadze A. "Svanetian Village in the Past" (1964); Molodini L., Chachashvili G. "Catalogue of Georgian Folk Costumes" (1964); Ethnography of Georgia – Printed Textiles (1964), Blue Tablecloths (1964), Ornaments on linen Textiles (1964), Ceramic: Red Earthenware (1964), Ceramics: Glazed Pottery (1964), Dolls (1964), Armour (1964).



Picture 4. Brailashvili's sketch, 1990, 257

**Vera Bardavelidze (1899-1970)**

Vera Bardavelidze was the head of the ethnographical department in Tbilisi History, Archeology and Ethnography Institute from 1965 till her death in 1970. Her scientific work was related with the study of everyday lifestyle culture of Georgian people: cosmological beliefs and ideas, the pantheon of divinities, fertility cults and rituals, Georgian folk holidays, folk ornaments and graphic arts. She was awarded with the Order of Lenin. Vera Bardavelidze put a great contribution in the process of forming and development of Georgian ethnographic school. Also, we should mention her pedagogical activity, and a number of ethnographers who were taught by her.

There were many tasks and less specialists at the stage of ethnography and ethnology establishment in Georgia. That is why, Giorgi Chitaia and Vera Bardavelidze challenged local correspondents from different regions of Georgia to collect and keep appropriate data. In 1930s Vera Bardavelidze started development of unified programme-questionnaires, according to which collection and systematization of data was performed (Jalabadze 2019, 7-8). Her research heritage is very important. The first work published in the Georgian language, dedicated to the complex study and research of Georgian ornament was performed by Giorgi Chitaia and Vera Bardavelidze (Bardavelidze 1939).

When Vera Bardavelidze started to study spiritual culture of Georgian nation (1931), she defined (even for the future generations of ethnologists) the major research tasks: 1. arrangement and research of folk calendars, according to different regions of Georgia; 2. analysis of importance and value of holidays for everyday practice and spiritual life; 3. research of the sources of Georgian folk holidays (Bardavelidze 1939, Cinastkvaoba, VIII).

Vera Bardavelidze's "Calendar of Svanetian folk holidays" (new year circle) finally published in collaboration with Nino Brailashvili in 1953, shall be especially noted among her works, where the author in details discusses general and local features of the holiday. In 1957 she published fundamental work "Early religious beliefs and traditional graphic arts of Georgian tribes", which became a guide for researchers, working in religious aspects of ethnology (Jalabadze 2019, 9-10). She actively collaborated with Nino Brailashvili. Brailashvili's sketches, used in V. Bardavelidze's work „Ivri Pshavelebi" are also very important (Rukhadze 1994, 9). Bardavelidze's works contain a huge array of data on the history and local-territorial forms of the traditional spiritual and social culture of Georgians (especially the highlanders). The author's ide-

as enriched theoretical ethnology and opened up new possibilities for studying and interpreting the early forms of religious ideology (Jalabadze 2019, 19).

### **Rusudan Kharadze (1909-1965)**

Rusudan Kharadze graduated from Faculty of Pedagogy of Tbilisi State University in 1930. In 1932–1933 she worked at the State Museum of Georgia. In 1937-1965 she performed scientific-pedagogic activity at Language, History and Material Culture Institute, Chair of Ethnography of Tbilisi State University and Ivane Javakhishvili Institute of History, Archeology and Ethnography. In 1955 she became a Doctor of Historical Sciences, her fundamental works are: Mtiuleti village in past (1965); Svaneti village in past (1964); Traces of a large family in Svaneti (1939) (Kharadze, Biographical Dictionary, National Parliamentary Library of Georgia.-<http://www.nplg.gov.ge/bios/en/00001482/>).

Rusudan Kharadze greatly influenced on the development of Georgian ethnological science. Her research covered the ethnic culture of the North Caucasus peoples and she proved that the study of Georgian folk culture required its comparison with neighbouring cultures. Rusudan Kharadze's field and scientific activities covered almost all historical-ethnographic regions of Georgia. Also, she collected materials that reflected the social situation in mountainous Georgia, especially in Tusheti, Khevsureti and Svaneti. Rusudan Kharadze researched the social relations of Georgian and the Caucasian peoples, the issues of the local social system. The whole range of ethnology issue was covered by her research work (Topchishvili 2019, 37).

### **Julieta Rukhadze (1921-2012)**

Julieta Rukhadze spent her scientific life at Ivane Javakhishvili Institute of History and Ethnography of Academy of Sciences of Georgia as scientific worker, finally holding position of the head of department. During the years, she headed the department, which was established by Giorgi Chitaia and played a significant role in studies of Georgian ethnography. The second World War was finished and the country was gradually rebuilt. A special governmental statement, aimed at promotion and development of the sciences, was issued (“Stalin decree”). Ethnographic branch, headed by V. Bardavelidze and G. Chitaia, in line with young enthusiast scientist, earned the awards. Special attention was paid to the regions of mountainous Georgia – Pshav-Khevsureti, Mtiuleti, Rachi, Svaneti, taking into account that Georgian folk heritage was well kept

there. J. Rukhadze actively joined ethnographic researches from that period (Gociridze 2012, 222-223).

**Conclusions:**

- Films and data, created under the management of Mirian Khutsishvili, present an interesting method of video monitoring of ethnocultural values. During videomonitoring, researcher acts as the observer, seeking for traditional elements, and fixes them by video camera. Credibility and real display of events present the necessary conditions of video monitoring. This approach keeps ethocultural elements preserved and gives the future generations possibility to see not subjective interpretation, but objective reality. The film *Shrovetide in Georgia* is a brilliant example of such approach. Video monitoring of spiritual culture elements is especially important, because such elements are very sensitive to values change process. The components of spiritual culture are: different beliefs and customs, related with agrarian field, ancient layers (and further branches) of folk religious thinking, holidays, being in process of constant transformation, video fixing of which actually assures one of the most important factors of their preservation.

- *Berikaoba-Keenoba*, presented in film “*Shrovetide in Georgia*” has mythological contents, based on idea of decease and regeneration of nature. The universal concept of dying and regenerating God is a characteristic feature of the World mythology. This universal mythological content is common for many nations and realized in spring carnivals, applying different ritual practices. Despite the fact, that the holiday kept its mythologic-religious content in different nations, the local differences make it rich and study of differences gives possibility to analyze the source of ancient cult mystery. Therefore, visual data presents one of the most important ethnographic sources.

- Nino Brailashvili’s contribution to creation of professional ethnographic sketches is very important and is characterized with topical diversity: old Georgian dwelling contrutions, distinguishing features of dressing, ceramics, gold work, jewelry, agriculturalan instruments, constructions, etc. The ethnographers used such sketcehs as the evidence from filed ethnographic researches. The rapid cultural dynamics causes dismissal of many cultural elements of traditional Georgian lifestyle and different issues of material culture. Therefore the importance of such sketches is rising and their application may contain not only illustrating, but also use of such sketches as ethnographic source and data.



- Ethnographic sketches of Mirian Khutsishvili and Nino Brailashvili help to restore culture and everyday lifestyle of some regions of the country. They are also the most important stage of development of two directions (film, sketch) of visual anthropology in Georgia.

- Women ethnographers' contribution to the process of establishment and development is very important. Their researches present many significant issues related with Georgian ethnographic household.

### **Bibliography:**

**Bardavelidze, V., 1939.** K'art'uli xalxuri ornamenti I. Xevsuruli. Barnavelidze V., C'itaia G., SSRK Mecnierebat'a Akademiis sak'art'velos filiali, Enis, istoriisa da materialuri kulturis instituti akad. N. Maris saxlobisa. T'bilisi;

**Bardavelidze, V., 1939.** Svanur dgeobat'a kalendari, ahali c'lis cikli, Cinastkvaoba, VIII);

**Bardavelidze V., 1941.** Ivris Ps'avelebi (dgiuri). in: Bulletin of the Institute of Language, History and material Culture, vol 2. ,Tbilisi;

**Bardavelidze V., 1953.** K'art'uli (Svanuri) sac'eso grapikuli xelovenebis nimus'ebi, Tbilisi;

**Bardavelidze V., 1957.** Po etapam razvitia drevneis'ix religioznix verovaniy I obryadov graphic'esкое iskusstvo gruzinskix plemen, Tbilisi;

**Brailashvili N., 1959.** Zenskiy kostum v Gornoy Rac'i, in: Materials the Ethnography of Georgia, vol. 10, Tbilisi;

**Brailashvili N., 1990** Georgia as i Saw it Ethnographic Sketches, «Khelovneba» Publishers Tbilisi;

**Brailashvili N., 1994.** Aseti maxsovs sak'art'velo, zeglis moamage (1), gamomcemloba samsoblo, T'bilisi;

**Bedukadze S., 1951.** K'vis damus'aveba mt'iulet's'i, in: Materials on the Ethnography of Georgia, vol. 5. Tbilisi;

**Bedukadze S., 1960.** C'klit' brunavi c'sk'vilebi aragvis xeobas'i, Tbilisi;

**Bochorishvili L., 1956.** C'alkeli k'alis t'avSaburavi, in: Materials on tile Ethnography of Georgia. vol. 8, Tbilisi;

**Bochorishvili L., 1956.** K'vemo ka'rt'lis istoriuli et'nograp'iidan. Sap'lavis z'eglebi. in: Materials on the Ethnography of Georgia, vol. 8, Tbilisi;

Biographical Dictionary, National Parliamentary Library of Georgia.- <http://www.nplg.gov.ge/bios/en/00001482/>), seen March 21, 2020

Ethnography of Georgia. 1964. Dac'it'uli k'sovilebi, Tbilisi;

Ethnography of Georgia. 1964. Lurji sup'rebi, Tbilisi;

Ethnography of Georgia. 1964. Ormanmenti k'selis k'sovilebze, Tbilisi;

Ethnography of Georgia. 1964. Keramika-c'it'eli t'ixis c'urc'eli. Tbilisi;

Ethnography of Georgia. 1964. Keramika-moc'ik'uli c'urc'eli, Tbilisi;

Ethnography of Georgia. 1964. Dedop'alebi, Tbilisi;

Ethnography of Georgia. 1964. Iarag'ebi, Tbilisi;

Film - SHROVETIDE IN GEORGIA B&W. 35 mm. Approx. 30 min. Author Mirian Khutsishvili, Georgian National Museum, 1986-1988;

**Gegeshidze M., 1956.** K'art'uli xalxuri transporti, vol. I: Surface Vehicles, Tbilisi;

**Gociridze, G., 2012.** K'art'uli et'noloiuri mecnierebis metri, Studies in History and Ethnology, Tbilisi;

**Gotsiridze V., Makharadze I., 2006.** Film fund of Georgian National Museum;

**Jalabadze N., 2019.** Vera Bardaveliz'iss 120 c'list'avis gamo, Papers of Caucasian Ethnology XIX, Tbilisi;

Kalendarnie obic'ai I obradi v stranax Zarubejnoi Evropi Istoricheskie korni I razvitie obichaev, 1983, Moskva, izdatelstvo Nauka;

**Kharadze R., Robikadze A., 1964.** Svanuri sop'eli z'velad, Tbilisi;

**Molodini L., Chachashvili G., 1964.** K'art'uli kostumis katalogi - xevsuruli, Tbilisi;

Narodiy mira. 1962. vol. 2, Narodiy Kavkaza, Moscow;

**Rekviashvili N., 1957.** Dobic'a i obrabotka gagata v Gruzii, in: Materials on the Ethnography of Georgia, vol. 9, Tbilisi;

**Ruhaz'e J., 1994.** Erovnuli kulturis didi moamage, z'eglis moamage (1), gamomcemloba samsoblo, T'bilisi.

**Ruhaz'e J., 1999.** Bunebis Z'alt'a agorz'inebis xalxuri dgesasc'auli saq'ar'veloshi, Tbilisi;

**Chitaya G., 1939.** Ploughing Tools of Georgia, Tbilisi (sak'art'velos saxvneli iarag'ebi. Tus'i, kalami, inaxeboda sak'rt'velos mecnieribat'a akademiis istoriisa da et'nologiis, ark'eologiis da et'nologiis instituts'i);

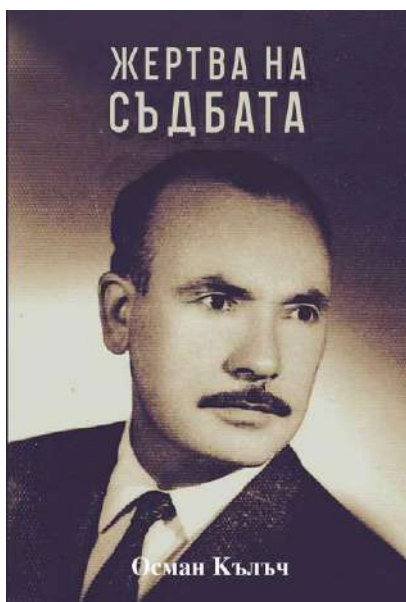
**Chitaya G., 1940-1941.** Goldsmith's Art of Georgia, Tbilisi (sak'art'velos ok'romc'edloba. Tus'i, kalami, inaxeboda sak'rt'velos mecnieribat'a akademiis istoriisa da et'nologiis, ark'eologiis da et'nologiis instituts'i);

**Tofchishvili R., 2019.** Rusudan Kharadze, K'art'veli xaxlis socialur urt'ert'obat'a kvlevis sap'uz'velc'amkreli, Papers of Caucasian Ethnology XIX, Tbilisi.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.22>**РЕЦЕНЗИИ***Милена Ангелова**Югозападен университет „Неофит Рилски“, Благоевград**Milena Angelova**South-West University “Neofit Rilski”, Blagoevgrad (Bulgaria)**[mangelova74@yahoo.com]***Жертва на властта, избраник на съдбата –  
спомените на Осман Кълъч на български език**

**Abstract:** *Review of the Bulgarian translation of the book “Victim of fate” by Osman Kilic*

**Key words:** *Memoires; Turks; Bulgaria; Victims of Communism.*



**Осман Кълъч. Жертва на съдбата. Прев. Зейнеп Зафер. София: Кралица Маб, 2020, 620 с.**

*Защо написах мемоарите “Жертва на съдбата”?... Изживях такива събития, преживях толкова прежеждия, че описвайки ги, аз разказвам не толкова за самите перипетии, колкото за трагичните им последствия... Аз съм част от турската общност. Живях сред нея години наред. Заедно оплакахме мъките и споделяхме страданията си. Така че, разказвайки незначителната си лична история, разказах за положението на цялата турска общност (Кълъч 2020: 610).*

Повече от 30 г. след края на ко-

мунистическия режим в България, в пъзела на опитите за осмислянето му, се натрупа солиден корпус както от историографски изследвания така и от лични свидетелства за този период. Наред с разкрасените и оправдателно звучащи спомени за „Народната република“ – в десетките мемоарни книги, написани от някогашни партийни функционери и представители на бившата номенклатура, бяха публикувани и гласове, резониращи различно – личните преживявания на репресираните от режима. Сред сравнително малкото издадени на български език мемоари на хора от турската интелигенция е и личната история на Осман Кълъч – разказ, оспорващ както „оправдането и банализирането на насилието на самия режим“ (Колева 2020: 203), така и опитите за поддържането му след неговия край. Преводът на български език на „Жертва на съдбата“ е сред изданията, които предлагат възможност в публичното пространство да се появят заглушавани преди това разкази – да бъдат изслушани, разпознати и приети или да предизвикат реакции.

Преди спомените на Осман Кълъч (1920-2021), публикувани на турски език още през 1989 г., да дочакат българския си превод, името на автора в българското медийно пространство най-често се свързваше със спекулативни и изфабрикувани твърдения, че е работил за турското разузнаване. Изкушавах се да озаглавя представянето на тази книга „Осъденият на смърт идва“, но щеше да прозвучи като несръчна препратка към известен холивудски филм.<sup>1</sup> Авторът на „Жертва на съдбата“, арестуван през 1948 г. и осъден на смърт в един от скалъпените от тогавашните управляващи в България пропагандни съдебни процеси, дочака за 100-годишния си юбилей неговите мемоари да бъдат публикувани и на български език.

Осман Кълъч е роден през 1920 г. в разградското село Ножарово (Кълъч кьой). Завършва висшата степен на мюсюлманското духовно училище Нювваб и става преподавател в него (Муратова, Зафер 2020: 14). През април 1948 г. той е арестуван по скалъпени обвинения и е осъден на смърт в показан съдебен процес.<sup>2</sup> Както

<sup>1</sup> „Осъденият на смърт идва“ (*Dead Man Walking*), 1995 г., реж. Тим Робинс.

<sup>2</sup> През 1948 г., паралелно с окончателната разправа с политическата опозиция, провокациите и шпиономанията в страната ескалират. От 1 септември 1948 г. всички съществуващи в страната чужди училища от всички степени и видове, открити или издържани от правителства на чужди държави, от различни религиозни мисии и конгрегации или фондации, са закрити. Започва преследването и арестите на повечето евангелски пастори в страната, на авторитетни фигури от католическата общност, на представители и на турската

подчертава и преводачката на книгата проф. Зейнеп Зафер: *„Процесът срещу младия преподавател и влиятелен интелектуалец Осман Кълъч в Шумен всъщност е показан процес срещу цялата турска интелигенция, срещу единственото висше духовно училище на мюсюлманите в страната, срещу системата на турското образование в България, срещу онази част от турското население в страната, което не одобрява политиката на режима“* (Зафер 2020). Повече от три години Осман Кълъч прекарва окован в килия за осъдени на смърт в Шуменския затвор. По-късно смъртната присъда е заменена с доживотна, а след това – с 20-годишна. Като политически затворник прекарва повече от 14 години в затворите в Шумен и Варна, в затвора на концлагера в Белене, в Пазарджишкия затвор, отново в Белене и накрая в Плевенския затвор. Кълъч е освободен от затвора през 1962 г. и още две години и половина прави опити да замине при семейството си в Анкара, тъй като съпругата и дъщеря му са експулсирани от страната още през 1951 г. Успява през януари 1965 г. с помощта на турски дипломати. Той започва работа като референт за България в дирекцията „Балкански държави“ на турското Министерство на външните работи. След това работи в турското консулство в Белград, а като преводач участва в турско-български правителствени срещи и преговори.

Осман Кълъч пише мемоарите си между 1984 и 1989 г., когато е публикувано първото издание в Турция. Спомените му са преиздадени през 1992, 2002 и 2017 г., като преводът на български език е направен от последното издание. Авторът пише спомените си по време на кулминаращите в България политики на насилствената асимилация на мюсюлманите, цинично наричана от тогавашните управляващи „възродителен процес“. Провокиран от тези събития, той намира изстрадания си мотив да разкаже своите преживелици – като споделен болезнен опит, но и като предупреждение: *„Останах повече от 14 години в тъмните комунистически затвори. Преживях безброй нещастия, през различни страдания преминах, но не можах да запиша нито ред. А злодействата, на които бях подложен, оставиха такива дълбоки следи в паметта ми, че само смъртта ще може да ги изтрие. Но паметта ми не е изписана тетрадка...“* (Кълъч 2020: 611). Осман Кълъч пише спомените си именно като мъчително свидетелство за преживяното и от други

---

интелигенция, завършили с фабрикувани обвинения и присъди за шпионска дейност в полза на Запада.

хора, останало потрупано от официалните версии на тогавашния политически режим. Именно издевателствата на които е подложена турската общност в България през 80-те години на XX в. и пропагандното изкривяване за външния свят за характера на случващото се в страната е причината авторът да се осмели да сподели горчивият си опит и като предупреждение: *„Колкото и да е опасно, един от нас трябва да поеме тази отговорност и да се жертва за народа си... Разбира се, че сам не мога да се противопоставя на комунистите. Празна работа е, ако се опитам сам да разбия стената с глава... Когато една голяма общност като турската се унищожавя пред очите на целия цивилизован свят, непременно трябва да излезе някой справедлив син на този народ и да заяви: Не, не можете да направите това!“* (Кълъч 2020: 225)

Като добре написан мемоар книгата не е просто сбор от житейски случки и спомени. Разказаните събития неизменно се въртят около оста на сложното осъзнаване на мисията в живота. Заглавието „Жертва на съдбата“ е избрано по-скоро в контекста на едно философско-религиозното приемане на „съдбата“. Въпреки изключителните житейски перипетии, авторът – очевидна жертва на престъпен режим, осъзнава себе си по-скоро като избраник, като „глас“ на съдбата: *„...Не искам заедно с моите смъртни останки да бъдат погребани в гроба изпитанията, на които бях подложен и страданията, които преживях в ръцете на българските комунисти-злодеи... Защо тъкмо аз написах “Жертва на съдбата”? Да ви кажа: защото съдбата избра именно мен!“* (Кълъч 2020: 610)

Българското издание на „Жертва на съдбата“ предлага превод, който завладява не само с емоционален и впечатляващ език, а и е истинско съпреживяване в 620 страници. Зейнеп Зафер не просто е превела текста – тя е добавила и над 200 бележки, които освен, че водят съвременния български читател в контекстите на преживелиците на автора, представляват и отделна изследователска работа. Това не е просто превод, предаващ наситено емоционалния заряд на разказа, но е и рядък пример на уникалната паралелност на преживяването – самата Зейнеп Зафер е политически затворник, когато Осман Кълъч пише спомените си и е наясно с цената, която плаща човек, приел сериозно отговорността към общността си.<sup>3</sup>

<sup>3</sup> През 1985 г. Зейнеп Зафер е осъдена на 2 г. затвор, 2 г. изселване и парична глоба. През 1988 г. тя е представителка за Варненска област на Независимото дружество за защита правата на човека /НДЗПЧ/, ръководено от Илия Минев.

Появата на български език на „Жертва на съдбата“ още веднъж припомня моралния императив на паметта: дългът да се помни е необходим за стимулиране на демократичните процеси в настоящето, а не само за поправяне на минали страдания и несправедливости (Колева 2020: 200). Това, че тази книга излезе на български език е проява на смелост – и на автора, и на преводачката, и на издателя. Става въпрос за текст, който по ред причини няма да се хареса на всеки – заради това, че заявява лични позиции и споделя биографичен опит, който до скоро беше, а и все още за някои е някак неудобен за излагане на показ.

### Библиография:

**Зафер, Зейнеп (2020).** В България след 55 години (За мемоарите на Осман Кълъч "Жертва на съдбата"). – *Електронно списание LiterNet*, 25.12.2020, 12 (253) [Zafer, Zeynep (2020). V Bulgariya sled 55 godini (Za memoarite na Osman Kalach "Zhertva na sadbata"). – *Elektronno spisanie LiterNet*, 25.12.2020, 12 (253)]. Web. 04.05.2021. <https://litenet.bg/publish29/zeinep-zafer/osman-kylych.htm>.

**Колева, Даниела (2020).** *Памет и справедливост. Лични спомени и публични разкази за комунизма*, София: Сиела [Koleva, Daniela (2020). *Pamet i spravedlivost. Lichni spomeni i publichni razkazi za komunizma*, Sofiya: Siela].

**Кълъч, Осман (2020).** *Жертва на съдбата*. Прев. Зейнеп Зафер. София: Кралица Маб [Kalach, Osman (2020). *Zhertva na sadbata*. Prev. Zeynep Zafer. Sofiya: Kralitsa Mab].

**Муратова, Нурие, Зейнеп Зафер (2020).** Политически и научни репресии – случаят Хайрие Мемова-Сюлейманова. – *Балканистичен форум*, 3, 9-56 [Muratova, Nurie, Zeynep Zafer (2020). *Politicheski i nauchni represii – sluchayat Hayrie Memova-Syuleymanova*. – *Balkanistic forum*, 3, 9-56].

**Чернокожева, Росица (2019).** Колко струва името на човека. – *Култура: портал за култура, изкуство и общество*, 29.12.2019 [Chernokozheva, Rositsa (2019). *Kolko struva imeto na choveka*. – *Kultura: portal za kultura, izkustvo i obshtestvo*, 29.12.2019]. Web. 05.05.2021. <https://kultura.bg>.

---

Включва се в щафетната гладна стачка в подкрепа на писателя Петър Манолов и е в групата дисиденти, чиято среща с френския президент Франсоа Митеран при посещението му в България през януари 1989 г. е осуетена, а всички дисиденти са задържани в Пловдив. Участва активно в изграждането сред турците в Североизточна България на структурите на НДЗПЧ, които подготвят и ръководят майските събития през 1989 г. – масовите протести сред турското население срещу „възродителния процес“. Експулсирана е от страната на 03.02.1989 г. (Чернокожева 2019).

DOI: <https://doi.org/10.37708/bf.swu.v30i2.23>

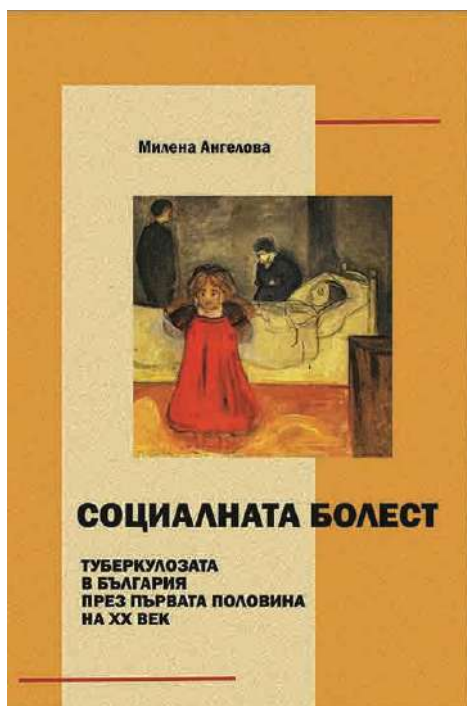
*Кристина Попова*  
*Югозападен университет „Неофит Рилски“, Благоевград*

*Kristina Popova*  
*South-West University “Neofit Rilski”, Blagoevgrad (Bulgaria)*  
*[chadoblg@yahoo.com]*

## Първо изследване на социалната история на туберкулозата в България

**Abstract:** *The aim of the review is to present the book by Milena Angelova „The social disease. The tuberculosis in Bulgaria in the first half of the XX<sup>th</sup> century“*

**Key words:** *social history; social diseases; tuberculosis.*



Милена Ангелова, *Социалната болест. Туберкулозата в България през първата половина на двадесети век*, Благоевград, Университетско издателство „Неофит Рилски“, 2020, 346 с.

Въпреки очевидното, особено в последните месеци огромно обществено значение на здравето и борбата с болестите, тяхната история като важна страна на миналото на обществото, дори в модерните времена в България, в голяма степен остава непроучена. Социални болести като едра шарка, туберкулоза, малария, холера, петнист тиф, коремен тиф, дифтерит, полиомиелит и много други, са били част от света на хора-



та. Прекършвали са живота на хиляди деца и възрастни. Без исторически изследвания не само не можем да разчетем културната памет на обществото, но и не оценяваме огромния принос на лекари, сестри, учени граждани, журналисти, на политици, на създадените от тях институции и дискурси, за да може днес обществото да е почти забравило тези болести и страховете, свързани с тях. Приемаме този напредък за даденост, но той е резултат на огромни обществени усилия. Всичко това е задача на историческата наука: изследването на разпространението на епидемии и болести в миналото, тяхното преживяване и представите сред населението за тях, здравните и социално дисциплинаращи практики, възникването и развитието на модерните здравни институции и политики на лечение и превенция, ролята на гражданския сектор и на международните здравни организации и мрежи и много други проблеми.

Туберкулозата е една от най-значимите социални болести във втората половина на 19 и първата половина на 20 век. При това, отнемайки в България по около 10 000 живота всяка година в продължение на десетилетия, тя не е просто сред значимите причинители на смърт, особено в ранна възраст, а слага своя отпечатък върху цялото общество и върху неговата култура, превръщайки се в един от ключовете за неговото разбиране. Досега тя не е проучена исторически в България (освен публикациите на авторката на настоящето изследване), но в САЩ и други европейски страни, както и в Русия, има редица сериозни изследвания по тази тема. Тук се изискват не само познания в различни области и боравене с най-разнообразни източници, но и умения и опит в интердисциплинарните изследвания, които съчетават подходи от историята, антропологията, историята на медицината и много други области. Милена Ангелова има значителен опит от работата си по широк кръг теми от историята на здравните и социални политики в България. Научната общност я познава като авторка и на редица публикации по история на туберкулозата. Книгата ѝ „Социалната болест“ е резултат на дългогодишни проучвания и работа в архиви и библиотеки не само в България, но също в Австрия, Германия и други страни. Това е първо задълбочено историческо изследване на туберкулозата в България и изобщо на социалните болести в модерната епоха у нас и в този смисъл Милена Ангелова трасира възможностите на един нов изследователски терен.

Книгата се състои от увод, четири глави, заключение и библиография и е в обем от 346 страници. Вътрешната структура е добре

балансирана около няколко централни проблема, обособени в отделните глави: научното и социално конструиране на туберкулозата, обществения дебат и държавните политики, дейността на дружеството за борба против туберкулозата и местата за лечение на болестта. Така авторката е постигнала трудната симетрия и органично съчетание на научните, институционалните, гражданските и човешките измерения на темата за туберкулозата, очертавайки и символните топографии на нейното разпространение, от една страна, и на лечението – от друга. Това е плътно интердисциплинарно изследване, в което личи авторовата ерудиция и умението да се борави с теории и факти от различни области. Наред с това Милена Ангелова избягва опасността от струпването на прекомерни детайли на професионалните медицински знания, от статистически данни и нормативни документи. Силна страна на книгата е богатият визуален наратив. Милена Ангелова е подбрала разнообразни визуални източници, както български, така и от редица други страни. Това са снимки, документи, плакати, рисунки, портрети и много други материали. Те не просто допълват изложението, но и представят значимостта на визуалния компонент в конструирането и възприятието на болестта, формирането на нейния метафоричен език и внедряването му в културния код на обществото и показват ролята на нагледността в пропагандата на борбата с туберкулозата.

В първата глава Милена Ангелова запознава българския читател с обществените и научни представи за туберкулозата още от гръцката и римска древност до модерната епоха. Тя проследява този дискурс в САЩ, Великобритания и европейските страни и романтизирането на болестта в културата на 19 век, паралелно с усилията за изясняването на нейната етиология и изнамирането на ефективни методи на лечение от учените в края на столетието, където изпъкват имената на Кох, Манту, Пирке, Рентген и много други.

Втората глава на книгата „Туберкулозата, общественият дебат и държавните политики в България 1879–1951“ очертава границите на българския случай. Тя детайлно проследява първите публикации и преводи и появата на професионални мнения по тази тема и осъзнаването на болестта като „най-голямо обществено зло“. Откроява се ролята на редица лекари и общественици и други агенти в областта на биополитиките. Това не са само имена. Милена Ангелова представя техните личности, биографии и приноси заедно с институционализирането на медицинските практики, нормативната уредба и развитието на статистически проучвания. Значително място е отде-

лено на осъзнаването на социалните фактори на болестта – бедност, липса на хигиена, лоши жилищни условия, недостатъчно хранене, както и тяхното политическо инструментализиране.

На дружеството за борба с туберкулозата е посветена трета глава. Тук отново се разширява географският обхват на изследването, като се представя международният опит в мобилизирането на обществения ресурс в борбата срещу туберкулозата. И в САЩ, и в отделните европейски страни от гражданския сектор идват важни импулси за държавната политика. Този пример е от голямо значение в българското общество, където още до времето на войните 1912–1918 г. се създават редица клонове на дружеството за борба с туберкулозата. А особено във времето след Първата световна война международният опит влияе все повече както върху дружествената дейност, така и върху формите на дружествена изява, пропаганда и въздействие върху обществото. Създаването на мрежа от клонове на дружеството и техните организационни изяви и широко медийно отразяване е представено като важно условие за просвещаване на местната общественост със здравни знания и статистики и информиране на постиженията в други страни. Независимо, че много от дейците на съюза заемат ключови позиции в здравната администрация, те все пак не успяват да преобърнат тенденциите в разпространението на болестта и смъртността от нея, предимно заради оскъдния бюджет.

Четвърта глава е най-голяма по обем и представя мрежата от лечебни институции: санаториуми, преванториуми, училища на открито, диспансери и други форми за лечение или превенция. В нея се преплитат частната, дружествената и държавната инициатива. Наред с приноса на гражданския сектор, ролята на обществото не е еднозначна. В някои случаи местната общественост е срещу разкриването и дейността на лечебни институции, като дава път на ирационални страхове от зараза или други опасения, свързани с локалния бизнес. Авторката навлиза в историята на тези местни структури. Тя разкрива историята на инициативите за създаването и поддържането на дейността им и обществения отзвук, техните проблеми, успехи и провали. Вниманието е насочено не само към лечебните практики, но и към свързаните с тях социално дисциплиниращи условия на дневния режим, както и с преживяването на пациентите.

В заключението Милена Ангелова обобщава както постиженията, така и дефицитите в борбата против туберкулозата в България за времето на изследваните от нея десетилетия. Макар политическа-

та промяна на 9 септември 1944 г. да преобръща радикално и идеологическата рамка на здравните политики в България, намаляването на заболяемостта и успешното лечение настъпват години по-късно и са свързани със задължителната имунизация с БЦЖ ваксина, подобряването на здравната инфраструктура и въвеждането на новите лекарствени средства.

Книгата на Милена Ангелова „Социалната болест. Туберкулозата в България през първата половина на двадесети век“ е ново явление в историческите изследвания по социална история и забележително постижение на българската историография. Тя придобива особена тежест в настоящата обстановка на изострена обществена чувствителност към въпросите на епидемиите и живота под опасността от заразяване. Книгата на Милена Ангелова ще допринесе за осъзнаването на значимостта на социално-историческите изследвания на болестите и епидемиите, както и на усилията за запазване на човешкото здраве. Насочена към един изключително важен проблем на социалната история, тя не само е първо изследване на туберкулозата, но е пример на рядко срещано изясняване на изследвания проблем в неговия международен историографски контекст, за дълбочено издирване на архивни свидетелства и други източници в една нова област, на умело боравене с теоретични постановки. В този смисъл тя е образец, който да се изучава от студенти и млади учени. Затова тази книга трябва да стане достояние не само на учени историци изследователи, но и на студенти по история, медицина, социална работа, здравни грижи, както и на широк кръг читатели.

DOI: <https://doi.org/10.37708/bf.swu.v30i2.24>*Кристина Попова**Югозападен университет „Неофит Рилски“, Благоевград**Kristina Popova**South-West University “Neofit Rilski”, Blagoevgrad (Bulgaria)**[chadoblg@yahoo.com]*

## Нов принос към утвърждаването на историята на здравните грижи като самостоятелна научна дисциплина

**Abstract:** *The aim of the review is to present the volume 9 of the biographical series ‘Who Was Who in Nursing History’, edited by Hubert Kolling.*

**Key words:** *nursing history; health care; biographical studies.*



Хуберт Колинг (съст.), *Кой кой е в историята на здравните грижи. Биографичен справочник на историята на здравните грижи, т. 9, 2020.* (Hubert Kolling (Hrsg.), *Biographisches Lexikon zur Pflege-geschichte. “Who Was Who in Nursing History”, Band 9, Hungen, 2020*)

Изминалата 2020 година, в която се отбелязва 200-годишнината от рождението на основателката на модерното сестринско дело Флоранс Найнтингейл (1820–1910), е посветена от Световната здравна организация на хората, които работят в сферата на здравните грижи. Макар голямата част от годината да премина под знака на мерките срещу коронавируса и заради това много от

предвидените събития, посветени на годишнината, се организираха

по-различно от предвидената програма, общественият интерес към здравните грижи навсякъде по света нарасна.

В тези месеци се появи и деветият том от „Биографичната поредица за историята на здравните грижи“<sup>1</sup>. Съставителят д-р Хуберт Колинг е доктор по политология, който живее в малкия курортен баварски град Бад Щафелщайн и от много години се занимава с история на здравните грижи, както и с местна история.

Деветата книга от поредицата съдържа нови 90 биографии на жени и мъже, които са допринесли за развитието на здравните грижи. С тях броят на представените в поредицата личности вече надхвърля общо 1400. Както и в предишните токове, за отделните статии е издирена малко известна досега информация за личностите, за основните моменти от живота им и техните приноси. Между тях сега за първи път са включени и няколко историци на здравните грижи – хора, които са създали и утвърдили този клон на историческите изследвания. Този принос се подчертава и чрез посвещаването на този том на паметта на основателя на поредицата за историята на здравните грижи Хорст – Петер Волф (1934 - 2019), за когото има и отделна статия в сборника.<sup>2</sup> Той е роден през 1934 г. в източноегерманския град Магдебург, който след войната остава в Съветската зона, по-късно в Германската демократична република – ГДР. Хорст Петер – Волф завършва медицински колеж в Магдебург, а в 1978 г. защитава дисертация в Хумболтовия университет в Берлин за историята на медицинската педагогика през 18 и 19 век. От 1982 г. в продължение на две десетилетия Хорст – Петер Волф преподава история на медицинските професии и история на здравните грижи в Медицинския факултет (Шарите) на Хумболтовия университет. Подготовката на тези курсове му разкрива липсата на биографични изследвания и публикации, необходими за преподаването. Така той започва да събира материал за кратки биографии от областта на здравните грижи, което поставя началото на първите три тома на „Биографичния справочник за история на здравните грижи“

<sup>1</sup> Замисилът и целите на поредицата са по-пълно представени в рецензиите за т. 6 и т.7 от биографичния справочник. Вж. Кристина Попова, История на здравните грижи в Европа през богатството от биографии на нейните дейци (рецензия): Хуберт Колинг, Лексикон на историята на здравните грижи, Балк. Форум, 2013, кн.3, с.272 – 277; Същата, Разширяване на биографичните изследвания в областта на здравните грижи (рецензия), Балканистичен форум, 2017, кн. 2, с. 304 – 307.

<sup>2</sup> Hubert Kolling (Hrsg.), Biographisches Lexikon zur Pflegegeschichte. „Who Was Who in Nursing History“, Band 9, Hungen, 2020, с. 286 – 291.

(1997, 2001 и 2004 г.). Заедно със съпругата си Юта Волф, която е медицинска сестра и преподавателка, той основава частен изследователски институт за история на здравните грижи, който ръководи до 2004 година. Биографичните проучвания са основен акцент в работата на института, както и миналото на здравните грижи в бившата ГДР и във Федерална република Германия (ФРГ). Към института се създава сбирка от визуални материали, снимки, филми и други документи. Хорст Петер Волф изследва курсовете и ранните училища за санитарни и болногледачи в края на 18 и 19 век, разкрива историята на понятието „Майчин дом“ и показва също, че много практики, които днес са се развили като самостоятелни медицински дейности и професии, в миналото са били част от здравните грижи.

Наред с многобройните си научни публикации, Хорст – Петер Волф е автор и на редица учебници по история на здравните грижи. С цялостната си дейност той в най-голяма степен допринася за академизирането на тази дисциплина.

Друга изтъкната изследователка, на която е посветена биографична статия в сборника, е германската историчка от Щутгарт Силвелин Хенер – Ромбах (1959 - 2019)<sup>3</sup>, авторка на множество книги върху социалната история на медицината и на здравните грижи. Тя завършва история и германистика в Щутгарт и Виена, като впечатлява още с магистърската си теза в Щутгарт „Бедна, от женски пол и луда. Пациентките от кралското лечебно заведение в Цвифалтен в огледалото на медицинските преценки и насочване в периода от 1812 до 1871 година“. След завършването на университета тя се насочва към социалната история на туберкулозата от времето на империята до Втората световна война.<sup>4</sup>

Като преподавателка в университетите в Щутгарт и Франкфурт, както и като изследователка, Силвелин Хенер – Ромбах има изключителни заслуги за издигането на историята на здравните грижи, чрез разширяването на понятието за изворовата ѝ база, както и на нейния инструментариум и методология, а също и чрез организиране на международни конференции, сборници с публикации, големи изследователски проекти, теми за докторати. Така тя допринася историята на здравните грижи да се утвърди като самостоятел-

<sup>3</sup> Пак там, с. 62 - 69

<sup>4</sup> Вж. Sylvelyn Haehner – Rombach, Sozialgeschichte der Tuberkulose von Kaiserreich bis zum Ende des Zweiten Weltkriegs unter besonderer Besichtigung Wuerttembergs, Franz Steiner Verlag, 2000.

на дисциплина, а не като подчинена част от историята на медицината. Основни теми в работата на Силвелин Хенер – Ромбах са от областта на историята на психиатрията, на туберкулозата и на здравното осигуряване, както и на историята на пола. Важни нови акценти, които тя внася в изследванията, са отношенията между пациентите и персонала в историята, особено някои групи пациенти – деца, бежанци или психиатричните пациенти, както и въвеждането в практиката на т. нар. „героични терапии“ – шокови, температурни и др.

Силвелин Хенер – Ромбах е сред основателите на обществото за история на здравните грижи (GАНН – German Association for the History of Nursing, участва в проекта „История на еврейските здравни грижи“ във Франкфурт, сътрудничи на редица списания по история на здравните грижи. През 1990-те години Силвелин Хенер – Ромбах работи по проекта „Голямото умирање. Епидемиите правят историята“, а по-късно – по подготовката на голямата изложба ‘Who cares’: История и всекидневие на здравните грижи във Франкфурт на Майн през 2011, както и по съставянето на „Извори за историята на здравните грижи“, отново с цел утвърждаването на историята на здравните грижи като академична дисциплина.

Най-новият ѝ проект е за грижите за болните деца след 1945 г. Това включва интервюта с някогашни детски сестри, с родители и близки. Смъртта на Силвелин Ромбах е болезнена загуба за историческото изследване на здравните грижи, пише Хуберт Колинг, защото с нея си отива една иновативна творческа личност.

Сред разнообразието и богатството на личностите в деветия том на биографичния справочник за историята на здравните грижи се откриват и други интересни имена. Тук е намерила място например необикновената личност на немския палеонтолог Ото Херман Олсхаузен (1840–1922), по образование химик, който след като работи дълги години в областта на праисторията, решава да се посвети на здравните грижи. Той не само работи 20 години в тази област, но и публикува книга, в която препоръчва редица подобрения в нея.

Деветият том на биографичната серия „Кой кой е в здравните грижи“ отново показва колко неочаквани и вълнуващи могат да бъдат биографичните пътища на хората, чиито необикновени съдби изграждат историята на здравните грижи. Очертавайки все обещаващ нови изследователски издирвания биографичен терен, съставителят Хуберт Колинг споделя, че в процес на подготовка вече е десетият том на поредицата.



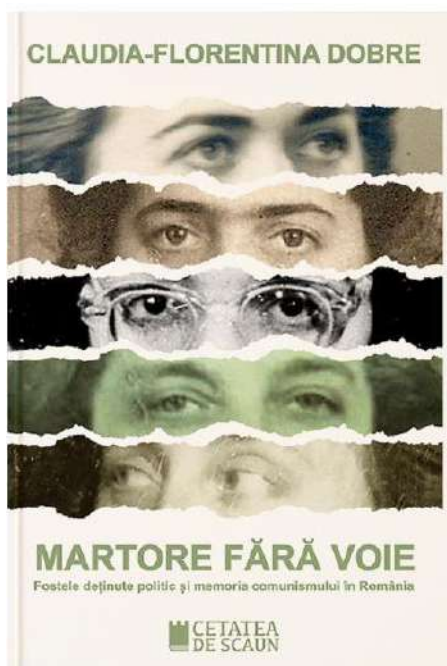
DOI: <https://doi.org/10.37708/bf.swu.v30i2.25>

*Ionuț Biliuță*  
*Gh. Șincai Institute/Romanian Academy*  
[ionut.biliuta@academia-cj.ro]

## The Unwilling Witnesses

**Abstract:** *Review of the book Claudia-Florentina Dobre "Martore fără voie. Fostele deținute politic și memoria comunismului în România".*

**Key words:** *communist regime; memory; political detainees; women; life stories.*



Claudia-Florentina Dobre, *Martore fără voie. Fostele deținute politic și memoria comunismului în România* [Unwilling Witnesses. Women, Former Political Detainees, and the Memory of Communism in Romania], translated from French into Romanian by Claudia-Florentina Dobre, Târgoviște: Cetatea de Scaun, 2021, 325 p. ISBN: 978-606-537-512-3.

"The Unwilling Witnesses," the political detainees described by Dr. Claudia-Florentina Dobre in her book, stand today as a commonality in the history of the former Soviet-dominated countries of Eastern Europe. The memory of the Communist repression against political or class adversaries shaped the countries' historical trajectory and determined tec-

tonic changes in reassessing the societal role of the dissidents and their persecutors. Thus, the present book enriches the already vast array of primary and secondary sources thriving on the legacy of the opposition to the spread and instauration of the Communist regimes in Eastern Europe.

Based on her doctoral research and the final draft dissertation at Laval University (Canada), the Romanian version is a revised and re-

shaped version of her doctoral thesis. It intends to unearth the relevance of the feminine resistance to communism and the habitus of the female detainee in Communist Romania. Furthermore, the author provides answers to some relevant questions about the post-Communist battles on the memory of resistance in the context of the continuation of the Communist party's nomenclature grab of political power in post-1989 Romania. Prefaced emeritus professor Bogumil Jewsiewicki (Laval University), the book has an introduction, six well-balanced chapters, both in structure and argument and an afterword signed by the author. While the introduction (p. 21-49) provides the reader with a short account of the main challenges encountered by the author while pursuing her research, the historiography of the topic, and the primary motivation that drove Dr. Dobre in writing the present volume, the following three chapters should be read and perceived as the highly sophisticated theoretical and methodological core of the book.

The first chapter, entitled "Fieldwork: problems and (re-)sources" (p. 49-95), discusses what it meant to be a female political prisoner in Communist Romania from the perspective of the theoretical framework and sources. (p. 49-50) Operating from the perspective of oral history, Dr. Dobre chooses to analyze the "life-stories" of the former female prisoners through the lens of a relationship that links the narrators with the researcher to explore both the personal, but also the collective memory of a particular group, in this case, the female bourgeois political prisoners. (p. 51, 53) Using the biographical method of investigation, in approaching the former political prisoners, the author considered three preconditions that set the stage for carrying the local fieldwork and interviews: their class appurtenance, level of education, and personal stories and social backgrounds in the case of the women prisoners that would mirror one another. (p. 57) Using the data that resulted from the 11 interviews carried by the author between 2003-2005 but also other interviews of political detainees, both men, and women, following Pierre Bordieu's taxonomy, Dr. Dobre intended to establish "a feminine habitus describing interwar bourgeois women" based on their shared values, gestures, and language used in their life stories. (p. 63) Besides the interviews, there are other sources employed by the author to reconstruct the social and collective memory of the female political prisoners, such as the post-communist newspapers (*Adevărul*, *Azi*, *România Liberă*, *Revista 22*) (p. 87) and the memorialist testimonies recollecting their prison experience penned by women (p. 91).

The second chapter discusses the position of the witness/political prisoner in the Romanian post-communist society. (p. 95-130) This section approaches the failed process of decommunization of Romanian public sphere and political life, the persistence of the Communist nomenclatura in the leading institutions and political parties post-1989, and the continuous demand from the former political prisoners, mass media, and civil society for an all-wide process of the communist regime that would entail political lustration and the legal punishment of the representatives of the institutions of repression (Securitate officers, party representatives, etc.). It continues with a list of “the memory vectors” such as the Association of the Former Political Prisoners (AFDPR), the Civic Academy Foundation and its patronage over the Memorial Museum [of Communist repression] from Sighet, the impact of the Romanian National Television documentary named “Memorialul Durerii” [the Memorial of Sorrow]. (p. 106-115) The collapse of the campaign striving for the complete lustration of former communists from the political life of the country vehemently required by the historical parties and the associations of political prisoners in front of the neo-communist strategies of manipulation of historical truth, but also the presidential condemnation of communism in December 2006 as a criminal regime that denounced the crimes of a political establishment rather than the actual executioners failed to provide the former political prisoners the much-needed restitution and satisfaction for their pain suffered behind the communist bars. (p. 118-125)

The third chapter (p. 131-155) expounds an array of national myths (the myth of national victimization and the interwar as a Golden Age), the post-communist process of typological heroization of the political prisoner (as the eternal Romanian peasant and the importance of the national savior), the cultural and religious traits (the Orthodox Church public appeal for national reconciliation and the prevalent trend towards historical amnesia and collective clemency in the Romanian society) of the Romanian public sphere that emboldened a national and overarching culture of forgiveness hindering any attempt of historical memorialization of the sufferings inflicted upon the political prisoners.

The second part of the book constitutes the interpretation of the empirical data collected by the author through interviews carried with women political prisoners. Chapter 4, "Life stories in a feminine key: topics and substance" (p. 155-201), identifies some common ground and traits between the women political prisoners recounting their life and experiences before, during, and after imprisonment. Dr. Dobre establishes these women had in common a perception of the interwar years as a

Golden Age and their childhood and family life despite the trials through which Romania during World War Two experienced as a careless and happy period of their lives. (p. 160) Moving up their lives, some of these women disregarded the imprisonment of their relatives and, according to their anti-communist views and their rebellious adolescence, expected the Western powers to curtail Soviet interferences and acted against the communist regime. Following through the interviews, the author also paints a credible account of their "lost time" starting with their unexpected arrest (p. 166-168), the interrogation by the Securitate (p. 168-173), the sham trial (p. 173-175), the prison experience at Jilava and Misllea prisons (p. 175-186), the subsequent strategies of survival behind bars (p. 186-189), and, finally, the liberation from prison (p. 189-198).

Chapter 5, entitled "The ethical realm of testimonies: a feminine perspective" (p. 201-233), approaches the feminine survivors as "witnesses" of history, as someone who saw history unfolding at a personal level. (p. 202-203) It also offers a detailed account of the forms of testimony these women embraced through memorialization narratives, preferably by three main categories of "women-witnesses": those who emigrated, the legionaries, and the women from the armed resistance. (p. 206-209). Despite the numerous obstacles (the inability to convey their experiences, shame and fear, the communist practices impeding their habitus) hampering remembrance and portrayed in the last section of the chapter (p. 223-226), the purposes of their testimony varied considerably from denouncing communism as "the absolute evil" (p. 214), the trans-generational transmission of their experiences and identity, the duty to witness the horrors of the prison experience and for those who cannot give testimony, but also as a "cathartic" ritual of social healing of their traumas through remembering the past (p. 221-222).

The last chapter should be read together with the conclusions of the book. After their release from prison, these women evolved from the representatives of the bourgeois class into enemies of the people and had to re-cast their identity through marriage or professional demotion to survive the communist surveillance. Nothing changed after 1989 when the political prisoners and especially the women interviewed by Dr. Dobre refused any label of the victim but, at the same time, because of the lack of lustration, penal condemnation of their persecutors or their modesty were deprived of their hero status, and their resistance went unacknowledged.

Nevertheless, the book also has some general flaws that need to be carefully attended in a future edition. One of them relates to the primary

sources employed by the author. Although she justified her decision not to use the former Securitate's files belonging to the women prisoners interviewed according to these women's wishes, it remains an open question why their penal files and the documentary films of the former Securitate escaped the grasp of the author. These archival materials would have enabled her to paint a much clearer picture regarding the historical context of the Securitate-led repression against class and political enemies regardless of gender. Furthermore, the secondary sources should be updated to the status of the present day in literature in the field. Though the afterword brings forth some titles without actual citations of pages, the critical apparatus of the book falls short of its broad intent and scope as sketched in the introduction. Most of the mentioned books and articles date before 2006, possibly taken straight from the doctoral dissertation, and since then, a lot has been said and done both in the international and local historiographies.

As a methodological suggestion, in a revised version of the book, the author should also consider more the ideological lens in the analysis of the interviews provided by former political prisoners. As archival documents and the recent secondary literature in the field underlines, legionary detainees tended to behave and employed other means of survival and creating bonds according to different scenarios than the representatives of the former Liberal and National Peasant Party or women belonging to various religious denominations. Ideology and political views played a significant role in shaping the imprisoned and post-imprisoned existence of the detainees, feminine prisoners included. No wonder that their anti-communist attitudes after post-1989 continue those from their interwar and World War Two years. Furthermore, a more relative angle of inquiry into these women's lives should also salvage the author from the danger of historiographic exceptionalism. What happened in both communist and post-communist Romania with political detainees in general and with women, in particular, tends to be very similar to other life stories and experiences in the Soviet-controlled block (Hellbeck, 2004, 2006; Halfin, 2009; Paperno, 2011; Müller, 2017; Kenney, 2017).

Highly interdisciplinary, innovative, and grounded on a French paradigm of historical analysis, the book by Claudia-Florentina Dobre represents a welcome addition to the literature in communist studies and the legacy of totalitarian regimes in Eastern Europe in general and in Romania in particular. It would also be helpful for Romanian studies and inspiring instruments for undergraduate and graduate students in history, political sciences, and sociology.

**BALKANISTIC FORUM**

**2/2021**

Volume XXX, Issue 2

**Editors:**

Kristina Popova and Nurie Muratova

**Format** 70/100/16

**Design:** Nurie Muratova

**Printed in Publishing House - South-West University**

Bulgaria, 2700 Blagoevgrad, 66 Ivan Mihailov str.