

On Agency and Ramparts in the Lower Danube and Spain

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Abstract

Having worked mainly on the late Roman and Visigothic walls of the Spanish provinces, I came across the details of Dacian-Moesian frontier defences mostly by chance, through a book by Carl Schuchhardt and his contributions to linear earthworks. I would like to contrast these *valla* in the specific angle of agency, as the discussions on the Moldovan wall of Athanaric and its chronology are reminiscent of questions posed as well in southwestern imperial contexts. Although no precise equivalences for such extensive, often river-connected ramparts are known in Hispania, I wish to put a few points in perspective and to establish some not strictly archaeological, but rather interpretive correspondences. The purpose is framing a meta-analysis for early Gothic defensive concerns, with a focus on large built structures, from the standpoint of their perceived usefulness, as a trigger for agency. The cultural reality of both territories in contrast is entirely distinct, and may therefore provide an interesting approach for the understanding of investment priorities in the genesis of very early medieval monarchies, and their negotiated implementation through transformed imperial mechanisms. Again, this evolved on radically separate realities. In a Danubian setting, one observes a frontier retraction associated with the political survival of the eastern empire; contrariwise, in Spain, a power substitution succeeded only through permanent negotiation with local and regional authorities. The text below takes this into account, yet looks explicitly at the reactive dimension, which was presumably pre-emptive and symbolic as well, of post-imperial embankments, walls, and other forms of linear defence.

Keywords: late antiquity, sponsorship, *valla*, comparative History, Gothic administration.

Framework and background

The story behind the identification of a sequence of connected earthworks in Moldova, articulated with the local orography, namely the Siret and the Prut rivers, owes much to the late 19th century scrutiny into a presumed imperial origin¹, and emerges in the context of a wider analysis on linear fortifications in the area². This did make sense from the perspective of a generic frontier-

¹ Carl Schuchhardt. "Wälle und Chausseen im südlichen und östlichen Dacien," *Archäologisch-Epigraphische Mittheilungen aus Österreich* 9 (1885): 202–232.

² Richard Mason and Costin Croitoru. *Carl Schuchhardt's Contributions on Ancient Linear Fortifications along the Lower Danube* (Cluj-Napoca: Mega, 2016).



based defence, hence an old and inappropriate Trajanian designation for this southern Bessarabian *vallum*. No fact actually supports the traditional ascription to Trajan's Dacian campaigns, but many of the large fortifications on the *limes Moesiae* are to be considered as part of later Roman military strategic options, as patently are the nearby Constantinian barriers defending Dacia³. The southern Moldovan *vallum* is however located on the opposite bank of the Prut, and does therefore not articulate well with the sections between the Prut and the Dniester, and more southwards, in the area of Constanța in modern Romania. Subsequent studies indeed led to a more detailed understanding of subsections, and, at least since Vulpe⁴, taking the structure as a so-called Athanaric's wall became a reasonable premise. In short, these embankments would constitute tangible proof of Ammianus Marcellinus on the 375-6 Hunnic assaults on Gothic territory (31.3.7): *Athanaricus, troubled by this unexpected attack and still more through fear of what might come, had walls built high, skirting the lands of the Taifali from the banks of the river Gerasus as far as the Danube, thinking that by this hastily but diligently constructed barrier his security and safety would be assured*⁵. If today's surviving text of Ammianus is to be taken literally, the expression *ad usque Danubium* would need to be understood as a vague direction, given that the physical structure itself ends on the Prut, as correctly pointed out by Tappe⁶. Antoche and Tanasache assumed that, out of all the ramparts in the region, the only section that might correspond to the description is located between the village of Ploscuțeni, on the Siret, and that of Stoicani, on the Prut⁷. More recent observations⁸ assist in tracing and refining precise locations of this *vallum*, but a reasonably cautious working hypothesis requires very broad chronological brackets.

³ Eugen Teodor and Magdalena Ștefan. "Landscape archaeology along Limes Transalutanus." *Journal of Ancient History and Archaeology* 1, no. 3 (2014): 31-43.

⁴ Radu Vulpe. *Le vallum de Moldavie Inférieure et le "mur" d'Athanaric* (Den Haag: Mouton & Co, 1957); Radu Vulpe. "Les valla de la Valachie, de la Basse-Moldavie et du Boudjak," in *Actes du IXe Congrès international d'études sur les frontières romaines*, ed. D. M. Pippidi (București / Köln: Editura Academiei / Böhlau Verlag, 1974), 267-276.

⁵ John Carew Rolfe. *Ammianus Marcellinus, History, Volume III, Books 27-31. Excerpta Valesiana, Loeb Classical Library 331* (Cambridge: Harvard University Press, 1939).

⁶ Eric Ditmar Tappe. "Le Vallum de la Moldavie Inférieure et le Mur d'Athanaric. By R. Vulpe," *Slavonic and East European Review* 37 (1958): 314.

⁷ Antoche, Constantin and Tanasache, Marcel. "Le vallum (Troian) de la Moldavie centrale." *Etudes Roumaines et Aroumaines, Sociétés européennes* 8, (Paris & Bucarest, 1990).

⁸ Richard Mason and Lucas Mason. "Unrecognized Remains of the Western Segment of the Ploscuțeni-Stoicani Vallum (Athanaric's Wall) East of Ploscuțeni (Vrancea County, Romania)," in *Ancient Linear Fortifications on the Lower Danube* (Cluj-Napoca: Mega, 2014): 27-40.

This uncertainty on the dating of large defensive structures strongly resonates in radically different, albeit Roman geographies. Moesian security challenges, for instance, had little to do with those of Hispania, except for some general administrative resemblances. As a matter of fact, the first remark needs to face the inexistence of broad-spectrum military strategies in the Roman world, and a mosaic of regional solutions had always been the norm instead. This goes against some older literature that looks at the Roman empire in a sort of equivalence to modern militaries, following an alleged grand strategy (Luttwak is a fine example⁹) which is both anachronistic and would have been technically unreasonable and unmanageable anyway. Another not very recent but convenient source on the defences of Dacia¹⁰ illustrates the interlaced nature of landscape and threats of Pannonian, Dacian and Moesian military integrations in full. They are only vaguely evocative of the mainly regional and low density operations encountered in Hispania, where initial Vandal and Suevic engagements were manipulated, and sometimes directly supported, by quite consistent legionary expeditions. These, and in later years also Gothic campaigns were conditioned not only by distance and topography, but fundamentally by the strength of social cohesiveness connected to regional landownership¹¹, which greatly determined the degree of need for additional investment in physical defences. The second notion is that of continuities, abandonments, and reuses of both concepts and structures during late antiquity, even when literary summaries may indicate very abrupt shifts. One such source is the 7th century interpretation of Isidore of Seville, according to whom Athanaric founded his kingdom in faraway Dacia (Hist. Goth. 6: [the Hispanic, not the AD] *Aera CDVII, anno V imperii Valentis*; i.e. 369), later to prosper on the Spanish territories. This link between both extremes of the Roman world is certainly debatable, and nothing in the primitive Gothic monarchies, be it in Spain or in Dacia, prompted modular transformations in defensive architecture. In practice, each monumental defence evolved according to local factors, often merely topographic in nature, which invalidates any pretension of rigid systematization. A regionalization in policing and defence based on episcopal and comital irregular forces becomes quite well perceptible in transitions between the house of Constantine and the reality transpiring in the later Visigothic law codes (e.g. Lex Wisig. 9.2.6-8). This is a rather complex evolution that entails much intricacy and deserves

⁹ Edward Luttwak. *The grand strategy of the Roman Empire: from the first century CE to the third* (Baltimore: Johns Hopkins University Press, 1976).

¹⁰ Nicolae Gudea, "The Defensive System of Roman Dacia." *Britannia* 10 (1979): 63-87.

¹¹ Adriaan De Man. "The *locus* in the context of late antique Spain." *Journal of Ancient History and Archaeology* 7, no. 4 (2020): 52-57.



more detailed discussions, but for the purpose of this paper it bears a question on the promotion of large, costly investments such as defensive structures. Two Hispanic examples may serve as food for thought in this comparative perspective, as they too suffer from later historical contaminations, in a similar way to that of the term Trojan, which has acquired a wealth of toponymical and legendary survivals in the Moldovan region¹².

The first and probably the most illustrative of such examples is the Cava de Viriato in Viseu, the Roman city of Vissaium, then the Visigothic bishopric of Beso, and later a regional frontier strongpoint between Christians and Muslims. A large defensive rampart, at the outskirts of the city itself, was built at an undetermined point in time, and configures an extensive *vallum* that nowadays reaches more than 4m in height, with a 4m deep, 7 to 8m wide ditch. Traditionally considered from the Roman period, in the 17th century it acquired a fabled connection with the Lusitanian chieftain Viriatus, who led a rebellion against Roman administration, and ultimately became a nationalistic figure the likes of Vercingetorix, Ambiorix, or Boudica. Ever since, the discussion has attracted plenty of attention, and provided inconclusive options between the Roman republican and the medieval periods (a short selection includes Girão¹³, Mantas¹⁴, Vaz¹⁵, Alarcão¹⁶, and Catarino¹⁷). One main issue is that, despite several excavations along different parts of the *vallum*, no datable material was retrieved, apart from a few fragments of scattered coarse ware, and a hydraulic connection that would have allowed for regulating the water level. A recent text insists on the possibility of a medieval “failed city”, purportedly initiated, then quickly abandoned¹⁸, yet the proportions and es-

¹² Costin Croitoru. “The “Trojan” in the Romanian Oral Tradition.” *Ancient Linear Fortifications on the Lower Danube* (Cluj-Napoca: Mega, 2014): 99-110.

¹³ Amorim Girão. “Cava de Viriato. Novos elementos para a sua interpretação.” *Beira Alta* III, 1 (1944): 69-75.

¹⁴ Vasco Mantas. “Indícios de Campo Romano na Cava de Viriato?.” *Al-Madan* II,12 (2003): 40-42.

¹⁵ Joao Ines Vaz. “A Cava de Viriato num documento do século XVII.” *Conimbriga* 45 (2006): 199-209.

¹⁶ Jorge Alarcão. “Notas de arqueologia, epigrafia e toponímia IV,” *Revista Portuguesa de Arqueologia* 9, no. 1 (2006): 131-147.

¹⁷ Helena Catarino. “A Marca inferior em Portugal na época de Almansor: hipóteses de trabalho e os exemplos de Viseu e Coimbra.” in *La Península Ibérica al filo del año 1000. Congreso Internacional Almansor y su época*, ed. José Luis del Pino García (Córdoba: Fundación Prasa, 2008): 123-146.

¹⁸ Manuel Real and Catarina Tente. “A Cava de Viriato – novos dados e interpretações.” *Do Império ao Reino. Viseu e o território entre os séculos IV a XII*, ed. Catarina Tente Viseu: Câmara Municipal, 2018): 121-129.

pecially the measurements of the fortification correspond exactly to Roman units: its thickness of 35m is 1 actus or 120 feet, while the internal diameter is 706m, meaning 20 actus or 2400 feet, and the exterior perimeter is 2960m, or about 2 Roman miles. This is a clear procedure in centuriations and other land surveys, visible in parcels such as the *iugerum* and the *centuria quadrata*. These metric observations were published in a short, important paper¹⁹ that concludes not necessarily for the Roman nature of the *vallum*, as the same traditions might have persisted throughout slightly later times.

Far from the Danubian and Rhenanian frontiers, and their specific threats, Visigothic walls in Spain, usually with but sometimes without *vallum*, have been looked upon as essentially urban in nature, and it is true that a number of such defences were not merely late imperial reconversions, but new building programs under indirect (e.g. at Merida) or direct (as in Recopolis) royal authority. The former example is an interesting case of reconversion and rebuilding by order of the Visigothic governor Salla, in conjunction with the local bishop, while the latter is an *ex novo* creation, within an ample scenario of kingly investment, namely in early medieval central Iberia²⁰. External pressure being caused not by invading Huns, but limited to more or less occasional initiatives from the continental side, early medieval non-urban, territorial fortifications were installed or rehabilitated mainly in Tarraconensis, along the passages through the Pyrenees (e.g. hilltops sites and full *clausura* systems such as Puig Rom, Les Cluses, Sant Vicenç d'Enclar, among others²¹). The other major territorial opposition consisted of a short-lived but considerably robust Justinianian expansion into the south-eastern regions. There are some markers of fortification efforts there, yet mainly in a strategy of a *limes* control, based not on linear defences but on border cities and their territories. The main difference with the mountain *clausurae* was conceivably geomorphic, associated with a perspective of low-scale military engagements, which indeed ended up being the case for a few decades: "Byzantine" coastal cities were only nominally considered as such, because of the mercenaries stationed there by the empire, and the corresponding Greek military administration. Regardless, the Pyrenaic *clausura* lines were not exclusively mountain gorge closures, as was

¹⁹ Rodrigo Banha Silva. "De Volta à "Cava de Viriato" (Viseu)." *Al-Madan* II, 17 (2012): 163-164.

²⁰ Lauro Olmo Enciso. "The Materiality of Complex Landscapes: central Iberia during 6th–8th centuries A.D." *New Directions in Early Medieval European Archaeology: Spain and Italy Compared. Essays for Riccardo Francovich*, ed. Sauro Gelichi and Richard Hodges (Turnhout: Brill, 2015): 15-42.

²¹ Cristina Godoy Fernández. "Archaeology in the eastern part of the Tarraconensis province in the times of the Visigothic kings," *Catalan Historical Review* 13 (2020): 9-25.



the case in the neighbouring Alps and Atlas realities, but composed of linear stone walls built as well in the lowlands that provided access to the mountains, a reality recognized for a long time now²².

Agency and its effects

In this handful of cases, it is agency, more than technology, that may be compared with Athanaric's wall. In other words, the material outcomes of Gothic authority and patronage regarding defensive investment is reactive, and builds on a precise territory, with its own imperial pre-existences, traditions, and perceived threats. Agency here needs to revolve around the relationships between individuals (Visigothic kings, governors, and so forth) and structures (not only tangible but especially social ones), in the sense that the latter condition the former through situational perceptions and beliefs, thus limiting the variety of practical choices. In short, social construction as much as any physical one would have prompted specific action and response by Gothic leadership, and it is not sufficient to enunciate Hunnic or Roman military positions on a map, especially as these would also have to be seen in the light of agency theory. Some good early syntheses on this academic approach can be found in Dobres and Robb²³ or Dornan²⁴, together with the most recent revival of academic discussions around agency, on criticism of New Materialism²⁵, on post-processual non-human, or object-based agency²⁶, or on the connections between agency and digital archaeology²⁷. The interpretation given to agency in this paper is a straightforward classical one, perhaps largely back to the simple centrality of Bourdieu's *habitus*, that is to say, to the unconscious constraint of the agent by his social structures. In other words, the promoter of a defensive structure in Spain or Dacia acts according to his "known knowns" only, and is motivated by a system that presents him with what he reasonably perceives as a limited set of choices. The inherent limitations in archaeological interpretations, such as the ones on Visigothic rampart building, require the combination of some

²² Alberto Balil, "La defensa de Hispania en el Bajo Imperio." *Zephyrus* 11 (1960): 179-197.

²³ Marcia-Ann Dobres and John Robb, *Agency in Archaeology* (London: Routledge, 2000).

²⁴ Jennifer Dornan, "Agency and Archaeology: Past, Present, and Future Directions." *Journal of Archaeological Method and Theory* 9, no 4 (2002): 303-329.

²⁵ Artur Ribeiro, "Archaeology and the New Metaphysical Dogmas: Comments on Ontologies and Reality." *Forum Kritische Archäologie* 8 (2019): 25-38.

²⁶ Astrid van Oyen, "Material Agency." *The Encyclopaedia of Archaeological Sciences*, ed. Sandra López-Varela and Julian Thomas (Chichester: Wiley Blackwell, 2018), 1-5.

²⁷ Lorna-Jane Richardson and Simon Lindgren, "Online tribes and digital authority: what can social theory bring to digital archaeology?" *Open Archaeology* 3, no. 1 (2017): 139-148.

by now conventional references on social groups²⁸ and on singular intentionality within cultural contexts, or “micro-processes”²⁹, making it so that the individual is more than a mere passive product of his circumstances, and rather acts according to different levels of acquired norms within a collective whole. This becomes clear when certain of these levels do not align between interpretations on Athanaric and other Goths, and their relationship with Romans, in Ammianus Marcellinus, Cassiodorus, or Jordanes³⁰, not all due to literary specificities or access to factual sources. On the other hand, a seemingly unambiguous effect such as defensive construction in the wake of a Hunnic attack is most probably not a linear equation either, as it calls for not only a variety of unknowns, but above all for the proper understanding of the agent (both individual and collective) and his sociological boundaries.

This presents natural relationships with the material effects of Gothic agency, i.e. the investment in large public works such as permanent walls and *valla*. Whereas extensive linear retractions from the later eastern empire, such as the Anastasian Long Wall, functioned appropriately on occasion, in a certain sense they may be seen, in this geography, as a prelude to what has been called the Great Age of Walls³¹, not to mention the fact that they follow a pattern which is quite common in other Roman frontier realities. As it happens, there was furthermore little appetite for structural disruption in late antiquity. The Gothic monarchies did retain many of the existing legal obligations, namely the *munera* system that had been wittingly put into practice for the construction of defensive walls (e. g. C. Th. 15.1.49, from the year 412, according to which all, no matter their condition, were forced to work for these rampart building programs). This is in full alignment with the several Theodosian regulations forcing citizens to participate in the fortification works, under imperial supervision, following less universal public requirements about the need to work on the appropriately called *munera sordida*, already since the mid-3rd century³². Still in Gothic Spain, where no massive linear defences are traceable, the continued tradition of putting local populations to

²⁸ Michael Shanks and Christopher Tilley, *Re-constructing Archaeology: Theory and Practice* (London: Routledge, 1987).

²⁹ Ian Hodder, “Agency and individuals in long-term processes.” *Agency in Archaeology*, ed. Marcia-Ann Dobres and John Robb, London: Routledge, 2000): 21-33.

³⁰ Arne Søby Christensen. *Cassiodorus, Jordanes and the History of the Goths: Studies in a Migration Myth* (Copenhagen: Museum Tusulanum Press, 2002).

³¹ David Frye. *Walls: A History of Civilization in Blood and Brick* (New York: Scribner, 2018).

³² Adriaan De Man. *Defesas Urbanas Tardias na Lusitânia. Studia Lusitana 6* (Mérida: Museo Nacional de Arte Romano, 2011).



work on city walls and other public infrastructures is very noticeable, as, for instance, was the case under Swinthila (Hist. Goth. 63). In addition to this specifically Spanish reference by Isidore, the practice is clearly ubiquitous and deep-rooted, given the straightforward directives by Cassiodorus on the mandatory civilian participation in the digging of ditches and the building of fortifications; it is worthwhile remarking that both his father and himself had a direct notion of the Hunnic reality. Now, Athanaric the Visigoth's authority was not that of the later kings of Gothic Spain, and of Cassiodorus and Theodorich the Great, and he certainly does never appear as a king in Jordanes and Ammianus Marcellinus³³, but rather as a "judge" of the Goths and, towards the end of his power, acting as a *reiks* of a reduced group or clan, before dying in Constantinople in a very diminished position.

The idea of a kingly *conditor* is to some degree present in the action of all Gothic rulers, in a clear attempt of association with forms of imperial authority. Until the mid-6th century at least, there is massive descriptive, albeit often anecdotic evidence on Gothic kings acting as if they were not equivalent to an emperor, but rather to high-ranking Roman governors, including through cultural, visual, and leisure practices that seem to differ little from those of great imperial noblemen³⁴, and included the corresponding military obligations in equally similar formats. For Spain, John of Biclar³⁵ refers defensive building programs precisely under Leovigild, including massive Visigothic fortified lines against the Sueves and the indigenous populations of the northwest. These do not actually configure continuously linear structures, yet instead an articulated control over sequential hilltops and roads. At this point in time, the mid-6th century that is, agency and sponsorship are clearly centralized on the figure of the king. During the preceding hundred years, there is a case to be made for the defensive investment by imperial contingents, at least until the last attempts to secure some sort of military relevance in the Spanish provinces, which coincide with a final unsuccessful offensive under Majorian in 460. In the Dacian situation, a much earlier *foedus* with the Tervingi had led to a very temporary degree of normalcy that ultimately ended with the last campaigns of Valens, and then the Hunnic expansion. Archaeological evidence points at occasional late garrison maintenances and at

³³ Herwig Wolfram. "Athanaric the Visigoth: monarchy or judgeship. A study in comparative history," *Journal of Medieval History* 1 (1975): 259-278.

³⁴ P. S. Barnwell, *Emperor, Prefects & Kings: The Roman West, 395-565* (Chapel Hill: University of North Carolina Press, 1992).

³⁵ Joan Rowe Ferry. *John of Biclar and his "Chronicle" (Spain)* (Houston: Rice University, 1990).

least partial reoccupation of a few rebuilt forts³⁶, and there is sporadic late 4th and early 5th centuries coin circulation in the region³⁷, but it is not even clear who in fact were the agents here, and it is safe to state that the empire had definitely retracted.

In both realities, post-Constantinian investment would point towards Gothic chronologies, but also the Theodosian order was very concerned with imperial defences, not only in strict pragmatic terms, yet in an expression of dynastic affirmation as well³⁸. In the Spanish case, this meant a continued support on large fortified cities and their territories, on which the Visigoths largely constructed an unstable network of loyalties. The monarchy, especially since Leovigild's reign, would maintain a clear distinction between *duces* and *rectores provinciae*, in an almost linear extension of the Roman system³⁹. Indeed, imperial norms of the second half of the 4th century (e.g. C. Th. 15.1.15 or 15.1.35) had made ample reference to the duties of said *rectores*, or civilian governors, invariably on matters of (defensive) construction and maintenance. On its turn, the *teloneum episcopi*⁴⁰, as a tax levied by the bishop, overlapping the late imperial annony circuits, reveals a recalibration of local powers stemming from the weakening of central power, correlated with the emergence of regional defence structures. The recurrent Visigothic incapacity in organizing a cohesive security policy in fact led very steadily to a decentralization in terms of security, in personal, casuistic formats that ensured power *in precarium*, that is on the basis of permanent nominal revocation⁴¹. It is clear that the recurrent security outcomes consisted of random actions by local Visigothic *comites*, and financial negotiation with local ecclesiastic actors. In stark contrast to this picture, no such compromise occurred in Dacia after the evacuation under Aurelian, and contrary to the bordering Ostrogothic organi-

³⁶ Andrew Poulter. "The Lower Danubian frontier in Late Antiquity: evolution and dramatic change in the frontier zone, c. 296-600." *Zwischen Region und Reich: Das Gebiet der oberen Donau im Imperium Romanum* (Berlin: Frank & Timme, 2010), 11-42.

³⁷ Delia Moisil. "The Danube Limes and the Barbaricum (294-498 A.D.). A Study in Coin Circulation." *Histoire & Mesure* XVII, 3/4 (2002): 79-120.

³⁸ Sarah Bassett. *The urban image of late antique Constantinople* (Cambridge: University Press, 2004).

³⁹ Gregorio García Herrero. "La reordenación conceptual del territorio en la "Historia Wambae" de Julián de Toledo." *Alebus* 6 (1996): 95-112.

⁴⁰ Kaiser Reinhold. "Teloneum Episcopi: Du tonlieu royal au tonlieu épiscopal dans les civitates de la Gaule (VIe–XIIe siècle)." *Histoire Comparée de l'Administration, Beihefte der Francia* 9, ed. Werner Paravicini and Karl Ferdinand Werner (München / Zürich: Artemis, 1980): 469-485.

⁴¹ Stanley Payne. *A History of Spain and Portugal, volume 1* (Madison: University of Wisconsin Press, 1973).



zation under Ermanaric, the Visigoths occupied the Dacian lands as tribes led by chieftains, vaguely and occasionally represented by a *iudex*⁴², as mentioned above in the case of Athanaric. Only the later proper kingly authority of Alaric would ensure a dynastic structure, tending towards more western regions.

Final remarks

Although the main chronological indicator for Athanaric's wall does make literary sense on a timeline within generic Gothic brackets, a more conclusive dating might clarify not only the structure itself, but also its articulation with other linear structures such as the so-called Greuthungian wall and other linear earthen fortifications in the areas of modern Moldova and Romania. This paper does not provide a systematization, but it hints at the similar technological and archaeological difficulties that hinder a clear ascription to a moment in time, and to an individual agent. In the case of kingly appropriation of imperial symbols, fiscal, legal and technological solutions, agency becomes a textbook example of context defining social behaviour and daily practice. Yet even for better known linear monuments, such as Hadrian's Wall and its *vallum*, the promotor's beliefs are not fully understood⁴³, and one may describe very well the existing evidence, but not the significance it originally had to the Roman army, apart from self-explanatory historiographic considerations such as defence or territorial control. If the majority of linear fortifications on the Dacian frontier represent exactly the edges of the empire⁴⁴, and some may have even served as a territorial marker only⁴⁵, the suggestion of post- or para-imperial origins for many large defensive works is not unreasonable. An objective look at pre-modern linear barriers concludes for a clear Gothic effort put into permanent earthworks⁴⁶, apart from the temporary ones (e.g. the massive structures Aetius and Theodoric hastily set up in Gaul against Attila (Jord. 37.194), and naturally the plethora of earth-and-palisade perimeters of small settlements, such as hillforts and villages, which are not directly relevant to the present text, although they might include a *vallum* as well. On the other

⁴² Jerzy Strzelczyk. "Visigothic Society of the 4th century in the Light of the Passion of Saint Saba the Goth." *Eos* 68 (2013): 367-386.

⁴³ D.J. Breeze, "The Vallum of Hadrian's Wall." *Archaeologia Aeliana 5th series* 44 (2015): 1-29.

⁴⁴ Horațiu Cociș. "Linear Fortifications on the North-Western Frontier of Dacia Porolissensis. An Overview." *Orbis Romanus and Barbaricum*, ed. Vitalie Bârcă (Cluj-Napoca: Mega, 2016): 41-54.

⁴⁵ J. J. Wilkes. "The Roman Danube: An Archaeological Survey," *Journal of Roman Studies* 95 (2005): 124-225.

⁴⁶ Peter Spring, *Great Walls & Linear Barriers* (Barnsley: Pen & Sword Books, 2015).

hand, Spanish Visigothic defences are mainly circumventing central places such as cities, and the few linear examples are not only exceptional but also reflective of regional power structures, rather than of centralized decisions by the monarchy. They are however important to bear in mind in a comparative light, as their dissimilarity originates not in concept but in context and agency, as the examples of linear, supra-tribal *valla* are produced by emergencies, not strategic thought, within the boundaries of social beliefs, preconceptions, understanding of the other, and the inherent limitations of place and time.

Rezumat

Cercetând în principal construcțiile defensive romane târzii și vizigotice din provinciile spaniole, am dat peste detaliile apărării frontierei daco-moesiene mai ales întâmplător, printr-o carte despre Carl Schuchhardt și contribuțiile sale la lucrările de terasare liniare. Aș dori să analizez aceste valuri dintr-un unghi specific, întrucât discuțiile despre valul moldovenesc al lui Athanaric și cronologia acestuia amintesc de întrebările puse și în contextele imperiale de sud-vest. Deși nu se cunosc echivalențe precise pentru astfel de metereze extinse, deseori legate de râuri, în Hispania, doresc să formulez câteva puncte într-o lumină comparativă și să stabilesc câteva corespondențe nu strict arheologice, ci mai degrabă interpretative. Scopul este încadrarea unei meta-analize pentru preocupările defensive gotice timpurii, cu accent pe structuri mari construite, din punctul de vedere al utilității lor percepute, ca un factor declanșator pentru agenți. În schimb, realitatea culturală a ambelor teritorii este complet distinctă și, prin urmare, poate oferi o abordare interesantă pentru înțelegerea priorităților de investiții în geneza domniilor medievale foarte timpurii și implementarea lor negociată prin mecanisme imperiale transformate. Din nou, aceasta a evoluat pe realități radical separate. Într-un cadru dunărean, se observă o retragere a frontierei asociată cu supraviețuirea politică a imperiului estic; contrar, în Spania, substituirea puterii a reușit doar printr-o negociere permanentă cu puterile locale și regionale. Studiul de față ia în considerare acest lucru, dar se uită în mod explicit la dimensiunea reactivă, care probabil era preventivă și simbolică, de asemenea, a terasamentelor, valurilor și a altor forme de apărare liniară postimperială.

Cuvinte cheie: antichitate târzie, sponsorizare, valuri, istorie comparată, administrație gotică.

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Dimitrie Cantemir, the First Modern Historian Writing on the Romanian-Bulgarian State Founded by the Asan Brothers¹

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Abstract

Hronicul vechimii romano-moldo-vlahilor includes some references to the Vlachs from Epirus and Thessaly, but Dimitrie Cantemir was mostly concerned with the greatest political achievement of the south-Danubian Romanians, the state created in cooperation with the Bulgarians after the rebellion of 1185 against the Byzantine domination. His main source was the history of Niketas Choniates, the most important for the first two decades of the state, but he ignored other indispensable sources like Georgios Akropolites or Jeffrey of Villehardouin. Large fragments from the book of the Byzantine historian and statesman Niketas Choniates were translated by Cantemir in his unfinished history of the Romanians. Even if he was wrong about the north-Danubian origin of the Romanian rebels, and even he made other mistakes like the identification of Ionița (Kaloian) with Ivanko, Cantemir achieved a valuable work. He described the events between 1185 and 1205 almost in concordance with what we know now (for the later period he did not dispose of enough data). Cantemir could be considered the first Romanian Byzantinist. The history of the Romanian-Bulgarian state was seen as a part of the general history of the Romanians. Cantemir was determined to establish the truth about the participation of Romanians at the revival of the Bulgarian state, denied by Mauro Orbini, one of the first promoters of the Panславist idea.

Key words: Dimitrie Cantemir, Niketas Choniates, Antonius Bonfinius, Mauro Orbini, Asan dynasty.

Hronicul vechimii romano-moldo-vlahilor was written between 1717 and 1723² using many Roman, Byzantine and Western sources, being in its most part a kind of history of the Byzantine Empire, like *Hronica Românilor* of Gheorghe Șincai, widely inspired from a copy of Cantemir's manuscript obtained in 1730

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² I used the edition: D. Cantemir. *Opere*, vol. I. *Divanul; Istorie ieroglică; Hronicul vechimei a Romano-Moldo-Vlahilor*. Ediție de Stela Toma, Virgil Căndea, Nicolae Stoicescu (București, 2003): 809-811.

by Innocentius Klein³ (the unfinished work remained unpublished until 1835)⁴. Besides the demonstration of the Roman origin and of the continuity of the Romanian people in the Dacian lands⁵, the work is remarkable for the introduction, for the first time in the Romanian historiography, of an extensive knowledge about the south-Danubian branch of the Romanians. It is true that Miron Costin and Constantin Cantacuzino knew that the *coșovlahi* were brothers of the Romanians, but their works do not present their history, with the exception of their involvement in the battle of Adrianople of 14th April 1205, known by Constantin Cantacuzino from the work of Antonius Bonfinius⁶. It is possible that Cantemir met some *coșovlahi* during his life at Constantinople, where he heard the name given by the Greeks, quoted in his book⁷. He understood that the Vlachs mentioned in various Byzantine sources were brothers of the Romanians of Moldavia, Wallachia and Transylvania, and he tried as much as possible to write their common history. The identity of the northern and southern Romanians was already observed by Laonikos Chalkokondyles, whose work, edited in 1615 and 1650, was well known by Cantemir⁸.

³ S. Toma, in Cantemir. *Opere...*, 854-862.

⁴ *Hronicul romano-moldo-vlahilor alcătuit de Domnul Moldovei. Dimitrie Cantemir la anii 1710*, Vol. 1-2 (Tipografia Sfintei Mitropolii, Iași): 1835-1836.

⁵ N. Grigoraș. „Originea, unitatea și continuitatea poporului român în opera istorică a lui Dimitrie Cantemir.” *Mitropolia Moldovei și Sucevei* 49, (1973): 9-10, 609-617; A. Armbruster. „Dimitrie Cantemir și romanitatea românilor.” *300 de ani de la nașterea lui Dimitrie Cantemir* (București, 1974): 77-84; A. Armbruster. *Romanitatea românilor. Istoria unei idei*. Ediția a II-a revăzută și adăugită (București, 1993): 228-233.

⁶ Miron Costin. *Opere*. Ediție critică cu un studiu introductiv, note, comentarii, variante, indice și glosar de P. P. Panaitescu (București, 1958): 258; *Istoria Țării Rumânești atribuită stolnicului Constantin Cantacuzino*. Ediție critică, studiu filologic, studiu lingvistic, glosar și indice de nume proprii de O. Dragomir (București, 2006): 176-177; Th. Capidan, *Aromânii. Dialectul aromân. Studiu lingvistic* (București, 1932): 46-47.

⁷ Cantemir. *Opere...*, 1049, 1357-1359 (III. XVI, VIII. X).

⁸ J. B. Baumbach. *Historiae Byzantinae scriptores tres graeco-latini vno tomo simul munc editi* (Geneva, 1615); Laonici Chalcocondylae Atheniensis *Historiarum libri decem. Interprete Conrado Clausero Tigurino (...)* *Accessit index glossarum Laonici Chalcocondylae, studio & opera Caroli Annibalis Fabroti*, Paris, 1650. The Romanian translation: Laonic Chalcocondil, *Expuneri istorice*, trad. V. Grecu, (București, 1958), (the statements about the Vlachs at p. 40-41, 189-190). The last edition with English translation: Laonikos Chalkokondyles. *The Histories*. Translated by Anthony Kaldellis, vol. I-II, (Cambridge (Massachusetts), London, 2014), (the statements about the Vlachs at I, p. 54/55, II, 64/65): they “settled from Wallachia about the Pindos range, extending down to Thessaly.

Both groups are called Vlachs, although I cannot provide any detailed argument for saying which of the two was first to arrive”; “As for Mount Pindos, on it dwell the Vlachs, who speak the same language as the Wallachians - for they are similar to the Wallachians by the Danube”.



In the Western historiography, the first edited book dealing with the state established by the Asan dynasty was *Histoire du Bas Empire commençant a Constantin le Grand* of Charles Lebeau, appeared in 1757. It was followed in 1774 by the work of the German linguist Johann Thunmann who emphasized the Romanian (Vlach) origin of the brothers Peter and Asan⁹, and in 1776 by the well-known *History of the Decline and Fall of the Roman Empire* of Edward Gibbon, who wrote that “The honour of the monarchy and the safety of the capital were deeply wounded by the revolt of the Bulgars and Wallachians. Since the victory of the second Basil, they had supported, over a hundred and seventy years, the loose dominion of the Byzantine princes. (...) Peter and Asan, two powerful chiefs of the race of the ancient kings, asserted their own rights and the national freedom”.¹⁰

Hronicul... includes some references to the Vlachs from Epirus and Thessaly¹¹, but Cantemir was mostly concerned with the greatest political achievement of the south-Danubian Romanians, the state created in cooperation with the Bulgarians after the rebellion of 1185 against the Byzantine domination¹², considered by him the first Romanian state¹³. The liberation of the Romanians during the reign of Isaac II Angelos was mentioned by Cantemir already in the chapter concerning the foundation of the first Bulgarian state (“publică deosăbită”¹⁴ – a distinct state, separated from the *Respublica* of Constantinople¹⁵), and in the chapter about the conquest of Bulgaria in 1018, when, as supposed Cantemir, the Romanians joined the Constantinopolitan empire¹⁶.

It is reasonable to consider Cantemir the first Romanian Byzantinist¹⁷. He was writing when many Byzantine writings were already edited and translated

⁹ J. Thunmann. *Untersuchungen über die Geschichte der östlichen europäischen Völker* (Leipzig, 1774): 355.

¹⁰ E. Gibbon. *The History of the Decline and Fall of the Roman Empire*, vol. X (New York, 1906): 338.

¹¹ Cantemir. *Opere...*, 1338-1339 (VIII. 1).

¹² Cantemir. *Opere...*, 1338-1382, 1418-1419 (VIII. 1-XVIII, X. 3).

¹³ P. P. Panaitescu, *Dimitrie Cantemir. Viața și opera* (București, 1958): 238-239; E. Țarălungă. *Dimitrie Cantemir. Contribuții documentare la un portret* (București, Chișinău, 2004): 157.

¹⁴ Cantemir. *Opere...*, 1265 (VI. XII).

¹⁵ For the idea of „Byzantine Republic” see now A. Kaldellis. *The Byzantine Republic. People and Power in New Rome* (Cambridge (Massachusetts), London, 2015).

¹⁶ Cantemir, *Opere...*, 1313-1315 (VII. VII).

¹⁷ Panaitescu, *Dimitrie Cantemir...*, 230-231; N.A. Hales. „Dimitrie Cantemir și izvoarele bizantine ale operelor sale”, *Studia Universitatis Babeș-Bolyai, Series Theologia Orthodoxa* 52, (2007, 1): 264; N.Ș. Tanașoca, „Byzance dans la conscience historique des Roumains.” N. Ș. Tanașoca, *Études byzantines et balkaniques* (Édition par O. Iacubovschi et A. Timotin, Brăila, 2018): 278.

ed in the West, among which are the *History* of Niketas Choniates, the main source about the state founded by the Asan brothers. The *editio princeps* was published with a Latin translation by Hieronymus Wolf at Basel in 1557, reprinted at Geneva in 1593, and used as basis for the edition of Charles Fabrot included in the Parisian *Corpus scriptorum historiae Byzantinae* (1647)¹⁸. Unfortunately, Cantemir did not read the *History* of Georgios Akropolites, who continued the narration after the events described by Niketas Choniates, for the period from 1207 to 1260. This work contains valuable and unique data about the Bulgarian-Byzantine relations and the tsars who reigned after Ioniță. The *editio princeps* of Georgios Akropolites by Theodore Dousa appeared in 1614 at Leiden, being reproduced in 1615 in a volume which includes the *Histories* of Nikephor Gregoras and Laonikos Chalkokondyles, edited by J. B. Baumbach. A better edition was achieved by Leon Allatzis (Allatiuas), a Greek librarian at Vatican, for the Parisian *Corpus*, in 1651¹⁹. Cantemir emphasized the difference between Vlachs and Bulgarians, or between Vlachs and Serbs, mentioned by Niketas Choniates in the same passages²⁰. The Cumans, who were valiant allies of the Romanians and Bulgarians, were called Tatars by Cantemir, but somewhere he specified that the Cumans were a Tatar population living in Podolia and Pocutia (not true)²¹. On the other hand, Cantemir makes a distinction between the Romanians ruled by the Asanids and the *coșovlahi* from Macedonia and Greece, who also rebelled under the leadership of the Vlach Dobromir Chrysos²², although Niketas Choniates called both groups with the same name *vlachoi*²³.

Cantemir ignored the relation about the Fourth Crusade and the following events written by one of the main participants, Geoffroy of Villehardouin. The first editions were published in Paris in 1585 and in Lyons in 1601, but the most spread was that of Charles Du Cange, included as the first part of

¹⁸ *Nicetae Acominati Choniatae (...) Historia, Hieronymo Wolfio Oetingensi interprete (...) cura & studio Caroli Annibalis Fabroti*, Paris, 1647. For the other old editions, see: Niketas Choniates, *Historia*, recensuit I. A. van Dieten (Berlin, New York, 1975): CV-CVI. English translation: *O city of Byzantium, Annals of Niketas Choniates*. Translated by H. J. Magoulias (Detroit, 1984).

¹⁹ *Georgii Logothetae Acropolitae Chronicon Constantinopolitanum (...)*, Lugduni Batavorum, 1614. Modern edition: Georgios Akropolites, *Opera*, recensuit A. Heisenberg, vol. I, Leipzig, 1903. English translation: George Akropolites: *The History*, Introduction, translation and commentary by R. Macrides (Oxford, 2007).

²⁰ Cantemir. *Opere...*, 1338, 1356, 1365 (VIII. I, IX, XI).

²¹ Cantemir. *Opere...*, 1350 (VIII. VII).

²² Cantemir. *Opere...*, 1357-1361 (VIII. X).

²³ Niketas Choniates. *Historia.....*, 487 (trad. Magoulias, p. 267) (FHDR III, p. 289).



his history of the Latin Empire of Constantinople (Paris, 1657)²⁴. The crusader's story has many pieces of information about the Romanian-Bulgarian state, not existing in the *History* of Niketas Choniates. The work of Du Cange also remained unknown to Cantemir, who otherwise would have been able to continue the history of this state after 1207, even without the essential contribution provided by the work of Georgios Akropolites. He gathered few other data from the *Histories* of Nikephor Gregoras and Ioannes Cantacuzenus. Nikephor Gregoras was edited by the same Hieronymus Wolf at Basel in 1562 (there is also a Parisian edition from 1702, which was most likely used by Cantemir)²⁵. The *History* of Ioannes Cantacuzenus appeared in 1603 and next in the Parisian *Corpus* in 1645 (edited by Jacob Pontanus, with commentaries by Jacob Gretser)²⁶.

The relation composed according to the book of Niketas Choniates was completed by Cantemir with what he found about the Latin Empire in one of his most quoted sources, *Rerum Ungaricarum decades*, by Antonius Bonfinius, finished in 1495. That book was in its turn inspired from the work of Flavio Biondo, published in Venice in 1483 (*Historiarum ab inclinatione Romanorum imperii decades*), based on older Venetian histories. Related by Flavio Biondo and Bonfinius, the story of the battle of Adrianople (the 14th of April, 1205) against the *Valachi* was thus inserted in the work of Cantemir. In relation with that battle, Bonfinius expressed his opinions about the origin of the Romanians. He knew they were the heirs of the Roman colonists in Dacia, but he invented a fanciful etymology of the name *Valachi*, from a Roman general *Flac-*

²⁴ Charles Du Fresne Du Cange, *Histoire de l'empire de Constantinople sous les empereurs français, divisée en deux parties, dont la première contient l'Histoire de la conquête de la ville de Constantinople par les François et les Vénitiens, écrite par Geoffroy de Villehardouin, revue et corrigée en cette édition sur le manuscrit de la Bibliothèque du Roy et illustrée d'observations historiques et d'un glossaire* (Paris, 1657).

²⁵ Nicephorus Gregoras, *Romanae, hoc est Byzantinae historiae Libri X, quibus res a Graecis Imperatoribus per annos CXLV, a Theodoro Lascari priore, usque ad Andronici Palaeologi posterioris obitum gestae, describuntur (...)*, Basileae, 1562; Nicephorus Gregoras, *Byzantina historia, graece et latine*, Paris, 1702. Modern edition: Nicephori Gregorae *Byzantina Historia (...)*, cura L. Schopeni, vol. I-II (Bonn, 1829, 1830). German translation: Nikephoros Gregoras, *Rhomäische Geschichte. Historia Rhomaike*, in Fortsetzung der Arbeit von J. L. Van Dieten, übersetzt und erläutert von F. Tinnefeld, 6 volumes (Stuttgart, 1973-2007).

²⁶ *Ioannis Cantacuzeni Eximperatoris historiarum libri IV*, ed. Jacob Pontanus, Jakob Gretser, Pierre Séguier (Paris, 1645). Modern edition: Ioannes Cantacuzenus, *Eximperatoris Historiarum libri IV. Graece et Latine*, cura L. Schopeni, vol. I-III, (Bonn, 1828, 1831, 1832). German translation: Johannes Kantakuzenos, *Geschichte*. Übersetzt und erläutert von G. Fatouros und T. Krischer, 2 vol. (Stuttgart, 1982, 1986).

cus – an idea shared by Cantemir²⁷. Bonfinius did not write anything else about the state established by the Asan brothers.

Cantemir was preoccupied not only to describe the history of the state founded by the Asan brothers, but also to reject the wrong interpretation of Mauro Orbini, who excluded the participation of the Romanians in the rebellion of 1185 and in the organization of the state. Cantemir considered Orbini a falsifier and a shame of historian („ocara și necinstea numelui istoricesc”)²⁸, not only in *Hronicul*, but also in the *History of the Ottoman Empire*, a work which was finished in 1717²⁹. Indeed, in *Il regno degli Slavi* (1601), this Croat Benedictine monk developed one of the earliest expressions of Pan Slavism, in the specific form of the Illyrism, an ideology already flourishing at that time. It was demonstrated that Orbini wrote his book using a mixture of genuine sources and forgeries in order to invent a Slavic autochthony in the Balkans³⁰. Based on the existing edition of Niketas Choniates, Orbini wrote about the rebellion of Peter and Asan, but called them *baroni di Bulgaria: Ma nel tempo d’Isaaco Angelo Imperadore li Bulgari, che sempre poco stimarono i Romani, con occasione d’alcune prede fatte ne’ loro armenti, & greggi, & delle grauezze, che patiuano, all’hora apertamente ribellarono dall’Imperio Romano. Li autori di questa ribellione furono Pietro & Iasen, da’ Greci detto Asane, due fratelli, & Baroni di Bulgaria. I quali, perche non paresse, che ciò hauessero senza ragione fitto, andarono à Cypselle dall’Imperadore, domandando, che fussero aseritti, & annouerati alle legioni Romane, & che appresso susse assegnato loro qualche poco di podere nel monte Emo*. In his text, the Vlachs were not inhabitants of Mysia, but a population living north of the Danube, who helped the Bulgarians (*passaando il Danubio riccorsero all’aiuto de’Valachi vicini*). Everywhere Orbini were called Vlachs the Scythians of Niketas Choniates, who were actually the Cumans. The name of Asan is corrected by him in “Iasen”. The passages where Choniates mentioned the real Vlachs are omitted. Dobromir Chrysos, βλάχος τὸ γένος at Niketas Choniates, became a Bulgarian at Orbini. In another place, Orbini dared to modify the phrase concerning the Vlach lan-

²⁷ Antonius Bonfinius, *Rerum Ungaricarum decades quatuor cum dimidia: his accessere Ioan. Sambvci aliquot appendices & alia (...)*, Francofurti, 1581, p. 277 (decade II, book VII).

²⁸ Cantemir. *Opere...*, 982 (Prolegomena, XI).

²⁹ D. Cantemir. *Istoria Creșterilor și a Descrășterilor Curșii Othoman[n]ice sau Aliothman[n]ice, de la primul început al neamului adusă până în vremurile noastre*. Traducere de Dan Slușanschi, vol. I (București, 2012): 198.

³⁰ S. Bujan. „La Chronique du Prêtre de Dioclée. Un faux document historique.” *Revue des Études Byzantines* 66, (2008): 17-38; J. V. A. Fine Jr., *When Ethnicity did not Matter in the Balkans. A Study of Identity in Pre-Nationalist Croatia, Dalmatia, and Slavonia in the Medieval and Early-Modern Periods* (Ann Arbr, 2009): 226-229.



guage spoken by a prisoner, making him speaking Bulgarian (*In questa giornata (oltra gli altri) fù preso un Sacerdote Romano, il quale sapeua benissimo la lingua Bulgara, & essendo menato verso l'Emo strettaméte pregaua, e supplicaua Iasé, accioche lo liberasse*)³¹.

In August 1722, the book of Orbini was published in Russian in a shortened form by Sava Vladislavić (1669-1738), the Serbian merchant entered in the diplomatic service of Peter the Great: *Kniga istoriografija počatija imene Slavy i razširenija naroda slavjanskogo*³². The Russian translation became “a sensation both in eighteenth-century Russia and in the Balkans, attracting attention and generating discussion in political and educated circles.”³³ The critics expressed by Cantemir were addressed only to Orbini, which could mean they were written before the publication of the Russian translation. Because Vladislavić was a rival for Cantemir, used by Peter the Great since 1703 as expert in Balkan problems, one could expect that the translation would be criticized³⁴.

A major mistake is the opinion that the rebelled Romanians came from north of the Danube³⁵. Because in his time, the Romanian population had already almost disappeared from the region of Stara Planina, Cantemir did not realize that in that area a rebellion of the Romanians was possible. In this light, the identification of the Great Vlachia with Moldavia could be understood,³⁶ mentioned in the *History* of John Cantacuzenus, III, 53³⁷. Cantemir rejected its right location in Thessaly specified in a commentary of Jacob Pontanus: *Veruntamen hic Thessalia, seu pars Thessaliae, nomine Blachiae significari videtur. Thessalis enim Angelum praetorem mittit. Eius montana, magna Blachia vo-*

³¹ Mauro Orbini. *Il Regno degli Slavi, hoggi correttamente detti Schiavoni* (Pesaro, 1601): 444–445, 452, 455, 458. The original text about the priest: *One of the captive priests, who had been carried off to the Haimos as a prisoner of war and knew the language of the Vlachs, begged Asan to release him and appealed to him to show him mercy.* (Niketas Choniates. *Historia*, ed. van Dieten, p. 468; transl. Magoulias, p. 257; FHDR III, p. 282/283).

³² Panaitescu, *Dimitrie Cantemir...*, 103, 105, 121, 177; J. Cracraft. *The Petrine Revolution in Russian Culture* (Cambridge, Massachusetts, 2004): 217.

³³ Z. Poláčková, P. Van Duin. „*The dwarf and the giant: Montenegrin-Russian relations and Montenegro's 'cult of Russia', c. 1700-2015.*” *Studia Politica Slovaca*, Bratislava, 9, (2016, 1): 38.

³⁴ V. Câdea, in D. Cantemir, *Sistemul sau întocmirea religiei muhammedane (Opere complete, vol. VIII, tomul II)*, (București, 1987): XXXVII, footnote 225, p. 668, footnote 1261.

³⁵ Cantemir. *Opere...*, 1345 (VIII. IV). The mistake was observed by Panaitescu. *Dimitrie Cantemir...*, 242; M. Berza. „Activitatea istoriografică a lui Dimitrie Cantemir.” *300 de ani de la nașterea lui Dimitrie Cantemir* (București, 1974) 37; Hales. *Dimitrie Cantemir...*, 273.

³⁶ Cantemir. *Opere...*, 1338-1339 (VIII. I).

³⁷ Ioannes Cantacuzenus, III, 53 (ed. Schopen, II, p. 321) (FHDR III, București, 1975, p. 488/489).

cantur (he ascribed the note to Jacob Gretser, whose name was wrongly transcribed as Iacov Predser).³⁸ Great Vlachia was indeed a land in the mountain part of Thessaly, existing during the 12th-14th centuries. It was mentioned by another source used by Cantemir, Nikephor Gregoras³⁹, but also by Georgios Akropolites⁴⁰.

Continuing the idea of the north-Danubian connection, Cantemir supposed that the Moldavian family Asan descended from the dynasty who established the Romanian-Bulgarian state (this supposition was already mentioned in *Descriptio Moldaviae*)⁴¹. The first records of this family in Moldavia are quite late, beginning with 1621, when a Constantin Aseni was mentioned among the men brought in Moldavia by Alexandru Iliăș⁴². It is surprising that Cantemir ignored that Mary of Mangop, the wife of Stephen the Great between 1472 and 1477, came from the branch of the Asan family established in the Byzantine Empire after 1280 (when John Asan III took refuge there)⁴³. The genealogy of these Byzantine Asenids was established by Ivan Božilov⁴⁴, and it is not excluded that the Moldavian boyars descended from them.

Another mistake is the confusion between Ioniță and the usurper Ivanko, who murdered Asan in 1196⁴⁵. Ivanko, after his betrayal to the Greeks, received the name Alexios, and Cantemir believed that Ioan Alexie, as he called him, was the same with the ruler who fought in the following years against Alexios III Angelos and next against the Latin Emperor Baldwin I. The real ruler was actually the youngest brother Ioniță, who took power in 1197 after the murder of Petru. More to the point, Ioan Alexie was also mistakenly identified with John Asan II, because Cantemir wrote that he reigned until the

³⁸ *Jacobi Gretseri Societatis Jesu Annotationes in Cantacuzeni Historiam*, in *Joannis Cantacuzeni Ex imperatoris...*, liber IV, p. 1039.

³⁹ Nikephor Gregoras, VI, 9, 2 (ed. Schopen, I, p. 203) (FHDR III, p. 507); translation Van Dieten, Tinnefeld, Erster Teil, Stuttgart, 1973, p. 169 (Kapitel VI).

⁴⁰ Georgios Akropolites, ed. Heisenberg, p. 43, 61 (chapters 25, 38) (FHDR III, p. 404/405). Translation Macrides, p. 179, 207.

⁴¹ Cantemir, *Opere...*, 1339, 1342 (VIII. I, II); Cantemir, *Descrierea Moldovei*, traducere de Gh. Guțu (București, 1973): 281.

⁴² Costin, *Opere...* p. 98; B. P. Hasdeu, *Etymologicum Magnum Romaniae*, ed. G. Brâncuș, II (București, 1974): 457; O. G. Lecca, *Familiile boierești române. Istoric și genealogie (după izvoare autentice)*, (București, 1899): 10.

⁴³ I. Božilov. *Familijata na Asenevtsi (1186-1460). Genealogija i prosopografija*, Sofia, 1985, p. 416-418; Șt S. Gorovei, "Maria Asanina Paleologhina. Doamna Moldovlahiei" (II), *Studii și materiale de istorie medie* 24, (2006): 56-59.

⁴⁴ Božilov. *Familijata...*, 249-434.

⁴⁵ As has also observed Hales. *Dimitrie Cantemir...*, 273-274.



invasion of the Tatars of Batie (the Mongol khan Batu)⁴⁶. He did not know that Ioniță died in 1207 at the siege of Thessaloniki. The conquest of Thessaloniki by the so-called Ioan Alexie⁴⁷ is an invention. The conquest described by Choniates in the passage paraphrased by Cantemir was that of Serres, occurred in June 1205⁴⁸. The passage speaking about Ioan Alexie who, after the conquest of the city, gave it to Theodore Angelos, could be explained as a confusion with the conquest of Thessaloniki by Theodore Angelos Comnenos Dukas in 1225. In another part of his work, Cantemir did not understand the significance of the name „Lord of Zagora” ascribed to Ioan by Niketas Choniates. Ignoring that this was the name of the region north of Stara Planina, he believed that Ioan was a Serbian ruler. In fact, it was the same Ioniță⁴⁹.

Even with such errors due to the insufficient information, the chapters of the *Hronic* dedicated to the Romanian-Bulgarian state are important because, for the first time, a historical work on the Romanian people included the southern branch. Cantemir described the events between 1185 and 1205 almost in concordance with what we know now. It is true that his text is a translation or sometimes a paraphrase after Niketas Choniates, but the result was a coherent and clear narration which unified the spared data on the fights of the Romanians, Bulgarians and Cumans against the Byzantine and the Latin Empires, and which is linked to his conception that the Romanian states belonged to the Byzantine Empire⁵⁰. The chronology of the events is also almost the same with that accepted by present scholarship. Cantemir was the first modern scholar who wrote about the history of the Romanian-Bulgarian state, and it is a pity that his work remained unpublished for so long time⁵¹.

⁴⁶ Cantemir. *Opere...*, p. 1365 (VIII. XI).

⁴⁷ Cantemir. *Opere...*, p. 1375-1376 (VIII. XV).

⁴⁸ Nicetas Choniates. *Historia*, ed. van Dieten, p. 618-619; transl. Magoulias, p. 339-340 (FHDR III, p. 318/319). See A. Madgearu. *The Asanids. The Political and Military History of the Second Bulgarian Empire (1185-1280)*, (Leiden, Boston, 2016): 157.

⁴⁹ Cantemir. *Opere...*, 1353- 1365, 1369-1380 (VIII. VIII-XI, XIII-XVII). See Madgearu. *The Asanids...*, 81-82.

⁵⁰ Tanașoca. *Byzance...*, 278.

⁵¹ The contribution of Cantemir to this subject was already presented by Al. Elian, *Introducere*, in FHDR III, p. XI; N. A. Hales, *Dimitrie Cantemir...*, p. 263-275; T. Bujduveanu, *Dimitrie Cantemir și Vlahii Balcanici. Mărturii din Hronicul vechimii a romano-moldovlahilor*, in *Dimitrie Cantemir – mare savant și cărturar. 300 de ani de la plecarea din domnie*, (București, 2012): 147-163.

Rezumat

Hronicul vechimii romano-moldo-vlahilor include unele referințe la vlahii din Epir și and Thessalia, dar Dimitrie Cantemir s-a preocupat mai ales de cea mai mare realizare politică a românilor sud-dunăreni, statul creat în cooperare cu bulgarii după rebeliunea din 1185 împotriva dominației bizantine. Principala sa sursă a fost *Istoria* lui Niketas Choniates, cea mai importantă pentru primele două decenii ale evoluției acestui stat. El a ignorat alte surse indispensabile, precum Georgios Akropolites ori Geoffroy de Villehardouin. Ample fragmente din opera istoricului și omului politic bizantin Niketas Choniates au fost traduse de Cantemir în lucrarea sa neterminată despre istoria românilor. Chiar dacă el a greșit în privința originii nord-dunărene a rebelilor, și chiar dacă a făcut și alte erori precum identificarea lui Ioniță (Kaloian) cu Ivanko, Cantemir a realizat o operă valoroasă. El a descris evenimentele dintre 1185 și 1205 aproape la fel cu ceea ce se știe acum (pentru perioada ulterioară el nu a dispus de date suficiente). Cantemir poate fi considerat primul bizantinolog român. Istoria statului româno-bulgar a fost abordată ca o parte a istoriei generale a românilor. Cantemir s-a simțit dator să restabilească adevărul despre participarea românilor la renașterea statului bulgar, contestată de Mauro Orbini, unul dintre primii promotori ai ideilor panslaviste.

Cuvinte cheie: Dimitrie Cantemir, Niketas Choniates, Antonius Bonfinius, Mauro Orbini, Asănești.

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Creation and Operation of Main Railways in Bukovina

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Abstract

This study aims to review the socio-political and economic preconditions of creation and beginning of operation of main railways in Bukovina. The analysis of scientific and memoir literature, recollections, review of archival sources allowed establishing the fact that the problem of formation and beginning of operation of the network of railways in Bukovina of the Austro-Hungarian period was not a subject of systematic and integral investigation. It was shown that the idea of building railways in Bukovina was also in the political and socio-economic interests of Austria in the south-eastern region of Europe because by laying railways, the imperial government provided itself with a favourable strategic position in the region. Based on the results of the study, it was established that with the construction of the Lviv-Chernivtsi-Iași railway, railway communications came to first place in the Austrian-Hungarian Empire in terms of material, technical, defense and economic potential.

Keywords: railways of Bukovina, Austro-Hungarian Empire, transport network, A. Ficker, G. Biedermann.

Introduction

Already 150 years have passed since the Lviv-Chernivtsi-Iași railway connected Iași, the former capital of the Principality of Moldavia, with Chernivtsi, the capital of the Duchy of Bukovina, and Lviv, the capital of the Kingdom of Galicia and Lodomeria, in 1870. The scientific basis for studying the issues of condition and development of the mentioned railways in Bukovina was laid by Austrian historians of the second half of the 19th century, most of whom lived in the region of Bukovina. One of the first significant works in the economic history of Bukovina (including transport) was a relatively small but rich in statistical data publication of Professor A. Ficker “One Hundred Years (1775-1875)”, published in Vienna in 1875 on the occasion of the 100th anniversary of the annexation of Bukovina to Austria¹. A. Ficker was one of the first to analyze the evolution of landowners’ estates from feudal dominions to entrepreneurial farms. He noted the measures aimed at intensification of farming agriculture and stock-raising, including the use of machinery, expanding the cultivation of industrial crops, changes in the structure of farming lands and cultivation areas in compliance

¹ Adolf Ficker. *Hundert Jahre (1775-1875)* (Wien: Verlag der k.k. statistischen Central-Commission, 1875): 7.

with the new market requirements, the level of profitability of estates, strengthening the commercialization of stock-raising and based on all these issues he showed the role of rail transport in the domestic economy of Bukovina and, in particular, for the agricultural sector of the economy.

On the occasion of the same anniversary, the Bukovinian historian of Austrian origin G.I. Biedermann published a historical essay “Bukovina under Austrian rule: 1775-1875” (1876)². In his essay, among other issues, he paid considerable attention to the system of land-tenure in Bukovina, distribution of land between peasants, landowners and the Orthodox Religious Fund of Bukovina, land-utilization system, national composition of landowners, the role of German colonists, number of peasant farms and network of local railways in Bukovina. As the Chernivtsi historian I.V. Zhaloba notes in his works, “... for Austrian historiography it is typical to consider the historical past of Bukovina through the prism of the cultural role of Austria. And although in Austrian historiography there are no special works on the history of railroads in Bukovina, in overall studies, where this subject is touched, the application of such an approach is observed. For this purpose, the method of contrasting the past with the present is used...”³. In the mentioned work of G. I. Biedermann, it is also stated that even a superficial glance at the state of the roads shows “a sharp contrast between the past and the present in terms of improving their construction”⁴.

The tendency when objective reasons are erased and the subjective factor comes to the fore is observed also in the works of other Austrian historians, such as R. F. Kaindl, J. Polek, K. Kozak, E. Fischer, et al. In addition, studying the history of railroads construction, Austrian scientists did not touch on the negative aspects of this process, in particular, such as growing exploitation of hired workers, impoverishment of craftsmen, etc. In general, the tendency to whitewash the activities of the Austro-Hungarian government in the field of construction of waterways and land roads in Bukovina was a typical feature in the literature of that time.

A. Ficker and G. Biederman practically initiated the study of socio-economic, including transport aspects in Bukovina in the second half of the 19th

² Hermann Biedermann. *Die Bukowina unter Oesterreichischer Verwaltung: 1775-1875* (Lemberg: Druck von Piller, 1876): 87.

³ Ihor Zhaloba. “Rozvytok Zaliznychnoi Merezhi Na Bukovyni U Druhii Polovyni XIX – Na Pochatku XX st.”, *50 rokov Vozziednannia Pivnichnoi Bukovyny i Khotynskoho povitu Bessarabii z Radianskoiu Ukrainoiu u skladi SRSR: Tezy dopovidei ta povididomlen oblasnoi istoryko-kraieznavchoi naukovoii konferentsii*, Chernivtsi, traven 11-12, 1990, 7 [in Ukrainian].

⁴ Adolf Ficker. *Hundert Jahre (1775-1875)* (Wien: Verlag der k.k. statistischen Central-Kommission, 1875): 7.



century⁵. Later, several works appeared⁶, in which the authors, along with other aspects, analyzed the state of development of the national transport system⁷ (including railway transport) of Bukovina⁸.

The most prolific (and objective) German historian of Bukovina of the Austro-Hungarian period was R.F. Kaindl⁹. He devoted a lot of attention in his works to the roads of Bukovina¹⁰, their infrastructure, construction and operation. In particular, the third volume of his most remarkable work “History of Bukovina”¹¹, goes about the preservation of significant feudal remnants in the region after 1848, the redemption of the land, condition of roads in Bukovina, about the network of railways and it is emphasized that the latter are used at a relatively low level. To some extent, he covered the same issues in his works “Hutsuls”¹², “Zhuchka”¹³, and “Bukovina in 1848 and 1849”¹⁴. In his studies we find information about the old trade routes that crossed the territory of the region in pre-Austrian times; on the construction of paved roads in Bukovina; on the use of rivers of the region for timber floating; time of commissioning of railways, their length, etc.

A significant professional study of the problems of railway transport in Bukovina in the Austro-Hungarian period was the work of E.A. Ziffer, President of the “Joint Stock Company of Local Railways of Bukovina”, “Local Railways in Galicia and Bukovina”¹⁵. The author, a specialist in the railway industry (but not a historian), having rich factual material at his disposal, highlighted the current state of the Bukovina railways in several aspects: employment of the population in the construction of local railways, some progressive changes in railway infrastructure, improvement of car and track facilities, organization of railway business, the activity of professional and cooperative organizations, increase in the level of provision with railway equipment, emphasized a positive role of railway transport in the development of the national economy of Bukovina. At the

⁵ Johann Polek. *Weinhandel und Weinbaum in der Bukowina* (Czernowitz: Pardini, 1904): 16

⁶ Eugen Worobkewicz. *Die geographisch – Statistischen Verhältnisse der Bukowina* (Lemberg, 1893), 116

⁷ Carl Romstorfer and Hubert Wiglitzky, *Vergleichende Graphische Statistik in ihrer Anwendung auf der Herzogtum Bukowina* (Wien, 1887), 503.

⁸ Emil Baier. *Fünfzig Jahre Viehzucht in der Bukowina* (Czernowitz, 1900): 22.

⁹ Raimund Kaindl. *Die Erwerbung der Bukowina durch Osterreich* (Czernowitz, 1894): 10.

¹⁰ Raimund Kaindl, *Geschichte von Czernowitz* (Czernowitz, 1908): 224

¹¹ Raimund Kaindl, *Geschichte der Bukowina. Dritte Abschnitt* (Czernowitz, 1898): 80.

¹² Raimund Kaindl, *Die Huzulen* (Wien, 1894), 129.

¹³ Raimund Kaindl, *Zuczka* (Czernowitz, 1900), 40.

¹⁴ Raimund Kaindl, *Die Bukowina der Jahren 1848 und 1849* (Wien, 1900): 68.

¹⁵ Emanuel Ziffer, *Die Lokalbahnen in Galizien und der Bukowina* (Wien, 1891): 190.

same time, the paper briefly describes the crisis that developed in the early 80s of the 19th century as a result of the shortage of capital for the construction of local railways in Bukovina.

For all the value of this work, we should note that not all phenomena were shown by him in dynamics for a certain period. Some data are given only for a particular year, mostly at the end of the 19th century. In addition, the work does not cover the period after 1890. This was the first relatively large 190 pages monograph.

Particular attention to the situation in Bukovina during that period and especially to the condition of Bukovinian railways was also paid by historians of tsarist Russia. However, their studies with a few exceptions were mostly based on imperialist positions to substantiate the rights of the Russian Empire to the future conquest of Bukovina and Galicia. I. Feshchenko-Chopivsky (1915); T. Florinsky (1900) et al. Pre-revolutionary works on the problems of private railway transport in Russia¹⁶ were mostly not of research,¹⁷ but journalistic nature¹⁸. But since their authors, as a rule, were well aware of the actual state of affairs, their works have an undoubted interest.

A significant scientific achievement of the 1990s – early 21st century in the study of ways of communication of Bukovina in the late 18th – early 20th century (including railway transport) were several articles and a thesis of I. V. Zhaloba¹⁹. His works deeply analyze the mechanism of development of ways of

¹⁶ Sergei Kul'zhinskij. *K Voprosu o Chastnyh Zheleznyh Dorogah v Rossii* (Sankt-Peterburg, 1909), 128 [in Russian].

¹⁷ Konstantin Zagorskij. *Chastnoe Zheleznodorozhnoe Stroitel'stvo i Garantiya Zheleznodorozhnyh Akcij* (Sankt-Peterburg, 1912), 54 [in Russian].

¹⁸ Aleksandr Bublikov. *Chastnoe Zheleznodorozhnoe Stroitel'stvo Poslednih Let* (Sankt-Peterburg, 1914), 55 [in Russian].

¹⁹ Ihor Zhaloba. "Puti Soobshcheniya Bukoviny v Konce Hviii – Nachale Hkh Veka: Istoriya Stroitel'stva i Narodnohozyajstvennoe Znachenie", PhD diss., Uzhgorodskij Gosudarstvennij Universitet, 1990 [in Russian]; Ihor Zhaloba. "Puti Soobshcheniya Bukoviny v Konce XVIII – Nachale XIX Veka: Istoriya Stroitel'stva i Narodnohozyajstvennoe Znachenie", Avtoreferat PhD diss., Uzhgorodskij Gosudarstvennij Universitet, 1990 [in Russian]; Ihor Zhaloba. "Derzhavni (kazenni) Shliakhy Bukovyny Kintsia XVIII – Pochatku XX st.", *370 Rokiv Khotynskoi Viiny: Tezy Dopovidei Mizhnarodnoi Naukovoii Konferentsii*, Chernivtsi, Veresen 27-28, 1991 [in Ukrainian]; Ihor Zhaloba. "Sporudzhennia Zaliznychnoi Mahistrali Lviv- Chernivtsi- Yassy (Seredyna 60-kh – Pochatok 70-kh Rokiv XIX st.)", *Tvorchi Vershyiny Vchenoho: Zbirnyk Naukovykh Prats, do 60-richchia Vid Dnia Narodzhennia Doktora Istorychnykh Nauk, Profesora M. H. Kukurudziaka*, № 1 (1998): 100 [in Ukrainian]; Ihor Zhaloba. "Pershyi Proekt Koliinoi Dorohy na Bukovyni", *Pytannia Istorii Ukrainy*, № 1 (1999): 253 [in Ukrainian]; Ihor Zhaloba. "Pozytsiia Tovarystva Pivnichnoi Zaliznytsi Tsisaria Ferdynanda u Spravi Halytskykh Zaliznyts (1855-1858 rr.)", *Naukovyi Visnyk Chernivetskoho universytetu* 73-74



communication in Bukovina (dirt roads, waterways, railways). In the general analysis of the ways of communication in the region, a significant place is given to railway transport²⁰. The author paid special attention to the discussion of the draft law on assistance to the Lviv-Chernivtsi railway in the Austrian parliament and highlighted its socio-political reaction (autumn 1863)²¹ in the railway policy of the Austrian government in Galicia during the years of the Crimean (Eastern) War (1853-1856)²², choice of the direction of the railway in the north-east of the Habsburg Monarchy and Bukovina in the 1850s – the early 1860s Brody or Chernivtsi²³, condition of the land roads in Bukovina of the late 19th – early 20th century²⁴, construction of the first local railways in Bukovina in the 1780s and their operational subordination²⁵, and finally, the issue of the railway communication Chernivtsi-Odesa in terms of geopolitical interests of Austria and Russia (1860s)²⁶. In his works I. V. Zhaloba reflected also the issues of the development of railways of the Austro-Hungarian Empire from the beginning

(2000): 94 [in Ukrainian]; Ihor Zhaloba. “Pidpriemnytska diialnist Lva Sapiehy v 40-kh-70-kh rokakh XIX st.. (na prykladi zaliznychnoho budivnytstva)”, *Mizhnarodnyi Naukovyi Konhres “Ukrainska istorychna nauka na porozi XXI stolittia”* 1 (2001): 211 [in Ukrainian]; Ihor Zhaloba ta F. S. Yatsentiuk. “Shliakhy Spoluchennia Bukovyny (kinets XVIII – Persha Polovyna XIX st.)”, *Anallele Bukovinei* IV, № 3 (1997): 727; Ihor Zhaloba ta Ralf Rot, “Misto i Zaliznytsia v Modernykh Doslidzhenniakh Nimechchyny ta Ukrainy”, *Pytannia Istorii Ukrainy* 6 (2003): 209 [in Ukrainian].

- ²⁰ Ihor Zhaloba. “Rozvytok Zaliznychnoi Merezhi na Bukovyni u Druhii Polovyni XIX – na Pochatku XX st.”, *50 rokiv Vozziednannia Pivnichnoi Bukovyny i Khotynskoho povitu Bessarabii z Radianskoiu Ukrainoiu u skladi SRSR: Tezy Dopovidei ta Povididomlen Oblasnoi Istoryko-Kraieznavchoi Naukovoii Konferentsii*, Chernivtsi, traven 11-12, 1990. [in Ukrainian].
- ²¹ Ihor Zhaloba. “Obhovorennia Proektu Zakonu Shchodo Spryiannia Lvivsko-Chernivetskii Zaliznytsi v Avstriiskomu Parlamenti ta Yoho Suspilno-Politychnyi Rezonans (osin 1863 r.)”, *Istoryko-politychni Problemy Suchasnoho Svit* 8 (2001): 155 [in Ukrainian].
- ²² Ihor Zhaloba. “Zaliznychna Polityka Avstriiskoho Uriadu v Halychyni v roky Krymskoi (Skhidnoi) Viiny (1853-1856 rr.)”, *Naukovi Zapysky Ternopilskoho Derzhavnoho Pedahohichnoho Universytetu im. Hnatiuka. Serii Istorii* 1 (2000): 212 [in Ukrainian].
- ²³ Ihor Zhaloba. “Brody chy Chernivtsi: Vybir Napriamku Zaliznychnoi Mahistrali Na Pivnichnomu Skhodi Habsburzkoii Monarkhii ta Bukovyny v 50-kh Rokakh – na Pochatku 60-kh Rokiv XIX st.”, *Naukovyi Visnyk Chernivetskoho Universytetu* 96-97 (2000): 123 [in Ukrainian].
- ²⁴ Ihor Zhaloba. “Stan Sukhoputnykh Shliakhiv Bukovyny Naprykintsy XIX – na Pochatku XX st.”, *Istoryko-politychni Problemy Suchasnoho Svit*, № 8 (2001): 22 [in Ukrainian].
- ²⁵ Ihor Zhaloba. “Sporudzhennia Pershykh Mistsevykh Zaliznyts Bukovyny u 80-kh Rokakh XIX st. ta Yikh Eksploatatsiine Pidporiadkuvannia”, *Naukovyi Visnyk Chernivetskoho Universytetu*, № 6-7 (1996): 73 [in Ukrainian].
- ²⁶ Ihor Zhaloba. “Pytannia Zaliznychnoho Spoluchennia Chernivtsi-Odesa z Tochky Zoru Heopolitychnykh Interesiv Avstrii ta Rosii (60-ti roky XIX st.)”, *Politychni ta Sotsiologichni Studii* 2 (2000): 12 [in Ukrainian].

of construction to 1854²⁷, the history of the Lviv-Chernivtsi railway to Suceava and Iași²⁸, the construction of Chernivtsi railway station²⁹ and finally, he told a wonderful story about the life and work of a civil engineer E. A. Ziffer, President of the Joint Stock Company “Bukovinian Local Railways”³⁰.

Modern historians from different countries of the world also do not ignore different aspects of the history of the formation of the railways in Bukovina³¹.

Analysis of scientific and memoir literature, recollections, review of archival sources allows stating the fact that the problem related to the study of socio-political and economic preconditions of formation and operation of the railway network in Bukovina of the Austro-Hungarian period was not the subject of the systematic and comprehensive study. In general, the beginning of operation of the railway transport in Bukovina in the literature is covered sporadically. Despite the diversity of the mentioned works, which to a greater or lesser extent covered this problem, it should be noted that there are still no works that would comprehensively study all aspects of socio-political and economic preconditions and the history of the formation and operation of the Bukovina main railways in the Austro-Hungarian period.

This study aims to review the socio-political and economic preconditions of creation and beginning of operation of main railways in Bukovina.

²⁷ Ihor Zhaloba. “Rozvytok Zaliznyts Avstriiskoi Imperii Vid Pochatku Budivnytstva do 1854 r.”, *Pytannia Istorii Novoho Ta Novitnoho Chasu*, № 4 (1995): 46 [in Ukrainian].

²⁸ Ihor Zhaloba. “Na Shliakhu do Chornoho Moria: Z Istorii Rozbudovy Lvivsko-Chernivetskoi Zaliznytsi do Suchavy i Yass”, *Zelena Bukovyna* 1-2 (2000): 38 [in Ukrainian].

²⁹ Ihor Zhaloba. “Budivnytstvo Chernivetskoho Koliinoho Dvirtsia V Seredyni 60-kh Rokiv XIX st. ta Bukovynska Hromadskist”, *Bukovynskiy zhurnal* 1-2 (2000): 85 [in Ukrainian].

³⁰ Ihor Zhaloba ta S. V. Pyvovarov. “Pamiatna Medal E.A.Tsiffera”, *Pytannia Starodavnoi ta Serednovichnoi Istorii, Arkheolohii y Etnolohii*, № 2 (2000): 173 [in Ukrainian].

³¹ Youri Rochniak. “Arkhitektura Budynkiv Pershykh Vokzaliv Zaliznytsi Lviv-Chernivtsi-Yasy”, *Suchasni Problemy Arkhitektury Ta Mistobuduvannia* 51 (2018): 482 [in Ukrainian]; Mykola Nazaruk ta Nataliia Ornat, “Ekoloho-heohrafichni Osoblyvosti Funktsionuvannia Zaliznychnykh Stantsii V Mezkhakh Mista Lvova”. *Liudyna ta Dovkillia, Problemy Neokolohii* 3-4 (2015): 66. [in Ukrainian]; Ivan Studnytskyi, “Typical Design Projects of Medium-Sized Railway Stations of Ukraine of the Second Half of the 19th Century – the First Third of the 20th Century: History, Spatial and Planning Structure, Artistic and Stylistic Aspects”, *Visnyk Lvivskoi Natsionalnoi Akademii Mystetstv* 35 (2018): 201, <http://doi.org/10.5281/zenodo.1313150> [in Ukrainian]; Youri Rotchniak, “Territorial Distribution Of Compositional And Stylistic Types of Houses of The Railway Stations of Halychyna and Bukovyna”, *Architectural Studies* 4, №1 (2018): 69; Mihai-Ștefan Ceaușu, “Reprezentare și Participare Politică. România în Consiliul Imperial Din Viena (1861-1873).”, *Anuarul Institutului de Istorie* 51, № 3 (2014): 95; Dariusz Opaliński, “Dyszem i Pod Parą, Czyli o Galicyjskim Kolejowo-Pocztowym Rozkładzie Jazdy z 1867 r.”, *Kwartalnik Historii Kultury Materialnej* 62.4 (2014): 613.



Socio-economic and political preconditions for the construction of the first railway mainline in Bukovina - Lviv - Chernivtsi - Iași and its international importance

The rapid pace of the transport revolution in advanced countries, which demonstrated a gigantic economic, political and military-strategic importance of railways to the whole world³², forced the government of the Habsburg Monarchy to deal very thoroughly with the issue of railways construction. Back in the late 1820s, leading Austrian railway engineers were sent on business trips abroad to study the railway business in England and Western Europe. Based on an in-depth study of the world experience in railway construction, they wrote multi-volume theoretical works in the form of “reports”, which became a remarkable event in the history of the world railway literature. In the works, they provided a comprehensive analysis of the state of railway transport and its role in the economic life of the leading capitalist countries, made substantiated conclusions about the application of the advanced world experience in the development of transport³³. In these works the detailed and theoretically correct studies were carried out to establish the constant width of the rail track, develop methods for manufacturing railway rails, construction of the roadbed, lay-out of ditch cuts, road bodies, pipelines, junctions, switch point communication, swinging circles, etc. Here for the first time the theoretical definition of “steam locomotive” was given³⁴. Thanks to

³² Anthony Burton. *Railway Empire: How the British Gave Railways to the World* (South Yorkshire: Pen and Sword, 2018), 32; Alfonso Herranz-Loncán and Johan Fourie. “For the public benefit”? Railways in the British Cape Colony” *European Review of Economic History* 22.1 (2018): 73, <https://doi.org/10.1093/ereh/hex010>; Svitlana Hurinchuk. “The Development of Railway Transport Engineering in The Russian Empire in The Second Half of the Nineteenth Century”, *History of Science and Technology* 9, № 2(15) (2019): 160, [https://doi.org/10.32703/2415-7422-2019-9-2\(15\)-160-174](https://doi.org/10.32703/2415-7422-2019-9-2(15)-160-174); Kerstin Enflo, Eduard Alvarez-Palau ra Jordi Marti-Henneberg. “Transportation and Regional Inequality: the Impact of Railways in the Nordic Countries, 1860–1960”, *Journal of Historical Geography* 62 (2018): 51, <https://doi.org/10.1016/j.jhg.2018.05.001>; Oleh Pylypchuk and Oleh Strelko. “Count A.P. Bobrinsky (1826-1894), the Third Minister-Reformer of Railway Management in the Russian Empire”, *Analele Universității din Craiova. Istorie (Annals of the University of Craiova. History)* XXV, №1(37) (2020): 7; Volodymyr Yanin, “Engineer of the Communication Lines Mykola Pavlovych Petrov (1836–1920): Factors for His Scientific Views’ formation”, *History of science and technology* 10, № 1(16) (2020): 88, [https://doi.org/10.32703/2415-7422-2020-10-1\(16\)-88-99](https://doi.org/10.32703/2415-7422-2020-10-1(16)-88-99).

³³ Pavel Mel’nikov. “O Rabotah Pri Ustrojstve Zheleznyh Dorog v Severo-Amerikanskih Shtatah (Iz Otcheta Puteshestviya Polkovnika Mel’nikova po Amerike)”, *Zhurnal Putej Soobshcheniya* 3, №1 (1842): 70 [in Russian].

³⁴ Viktor Virginskij, *Vozniknovenie Zheleznyh Dorog v Rossii do Nachala 40-h Godov XIX Veka* (Moskva, 1949), 256 [in Russian].

the great theoretical work of Austrian engineers in the first half of the 19th century in Austria, the fundamentals of the national railway scientific and technical school were laid. That is why starting from the late 1820s, the construction of the railway network in the Austrian Empire gradually expanded and ever more extended to the outskirts of the Empire, thus strengthening the mechanism of the country's economy with full-blooded transport "arteries". And although the building of the railway network in the Austrian state had its ups and downs – it was clear to everyone that it would be impossible to go without the construction of such a network³⁵.

Since the 1840s, a new stage in the government policy of the Austrian Empire concerning railway issues began, the defining moment of which was the transition to state-owned railway construction, which resulted in the construction of several railways. This was associated with the fact that the construction of a rail track, its operation and maintenance required significant investments, which are not always and not in full could be found. No doubt, that those crown lands (provinces) of the Austrian Empire, which were richer and industrially developed, had a better position because they could always provide their partial or full funds and rely on national and foreign investments. As a rule, the much worse condition was in the industrially underdeveloped, agrarian lands of the Austrian Empire. And Bukovina was among the latter. Such circumstances did not afford any grounds for laying such a mainline over the territory of the region of Bukovina and it could not be of interest to a big national and foreign business. Moreover, if we add here political conflicts in the region, it would be needless to hope for any progress in the transport modernization of Bukovina at all.

Here the statement of I. V. Zhaloba about the beginning of the construction of real railways in Bukovina should be added: "the 60s of the 19th century was one of the most difficult and largely epoch-making milestones in the history of the Habsburg Empire: it marked with the end of the neo-absolutist regime and transition to parliamentarism, defeat in the war with Prussia and "Ausgleich" ("Compromise") with Hungary. These were only the most important political milestones. As for the economic sphere, it was the period of transition from economic stagnation at the beginning of the decade to an incredibly active economic phase called "Gründerzeit" in the second half of the decade, which lasted up to the crisis of 1873. It was the activity that led to a new leap in the development of the Monarchy's railways. The prologue to this development was the

³⁵ Ihor Zhaloba. "Rozvytok Zaliznyts Avstriiskoi Imperii Vid Pochatku Budivnystvva do 1854 r.," *Pytannia Istorii Novoho ta Novitnoho Chasu*, № 4 (1995): 46 [in Ukrainian].



construction of the Lviv-Chernivtsi railway in the Cisleitaniien part of the state, i.e. the implementation of a new, really large railway project after several years of stagnation in the area, caused by the fact that earlier the private capital was rather apathetic to such undertakings³⁶.

The construction of a railway in Bukovina in the late 1850s – early 1860s was considered in several aspects – it should be a track that would connect the centre of the Austrian Monarchy with the Black Sea ports of Europe and at the same time provide the interests of the Austrian government and big capital. On the other hand, such a mainline would be very beneficial for the development of the national economy in the region of Bukovina. After numerous alterations to the projects of the construction of the mainline that would run through Bukovina, the central place was taken by the project of connecting Lviv with Chernivtsi.

The question about the construction of this mainline was for the first time raised in 1845. Later, this need was also mentioned in different projects and completion reports submitted to the Viennese government and discussed in newspapers and magazines. However, in 1848 the Austrian government decided to build a state railway from Bochnia (a city in nowadays Poland) to Lviv and its two further branches: one to Brody, another to Chernivtsi. However, the political instability during the revolution in the Austrian Monarchy in 1848–1849 prevented the implementation of this project³⁷.

Reports about the construction of a railway in Bukovina are found in several publications of that period. For example, in the Galician press, it was reported that in the spring of 1852, the building of a section of the Yaroslavl-Przemysl-Lviv railway would start and the final destination of the railway the city of Brody was intended to be. In addition, it was also noted that somewhere near Lviv from this mainline the construction of a side branch would soon begin, which would pass through Sambir, Stryi, Zalishchyky and Chernivtsi and would stretch to the border of Moldavia. The “Chas” daily newspaper referred to the reports from Austrian engineers who had already begun the necessary preparatory works.

The next year, in 1853, Carl Ghega, the head of the General State Railways Construction Directorate, submitted a memorandum to the Ministry of Trade, where he demonstrated a project for the development of a railway network in

³⁶ Ihor Zhaloba. “Obhovorennia Proektu Zakonu Shchodo Spriyanniia Lvivsko-Chernivetskii Zaliznytsi v Avstriiskomu Parlamenti ta Yoho Suspilno-Politychnyi Rezonans (osin 1863 r.)”, *Istoryko-Politychni Problemy Suchasnoho Svitu* 8 (2001): 155 [in Russian].

³⁷ Petro Lazečko. “Arterii Dorog: Z Istorii Budivnictva Zaliznic’ u Skhidnij Galichini”, *Zhovten’* 11, (1987): 115 [in Russian].

the Austrian Empire. It was a well-considered project and its author emphasized that the presented plan for the development of railways was predetermined by the lag of Austria in quantitative indices of railway construction from major European countries and the United States. C. Gegha substantiated the construction of separate railway lines, set the geographical features of individual regions of the Austrian Monarchy in opposition to their economic and military needs. In this regard, I. V. Zhaloba notes: "According to the plans of Gegha, through the Austrian state from West to East three large lines should be laid, which would intersect vertically with the north-southern lines. The northernmost of the planned east-western lines extended from Bukovina and Galicia through Krakow to Prague and Eger. Thus, taking into account the already existing railways, a kind of giant railway bridge across the Carpathians between Vienna and Chernivtsi is created. In Gegha's opinion, this railway, which had to foster the economic rise of Galicia and Bukovina, had to be built at state funds"³⁸.

Of course, talks about the construction of a railway in Bukovina found a very enthusiastic reaction in the Chamber of Commerce and Industry of the region, because it was the institution that defended the interests of Bukovina. Because it was useless to expect any financial support from Bukovina, the Chamber focused the attention of government circles on the national and trade-political needs of such a railway. Moreover, since the early 1850s, the Chamber underlined the nationwide need for construction of the opposite railway from Chernivtsi to Lviv, emphasizing that this was an extremely important addition to the Central European railway network. It was also emphasized on the interests of Austria to establish a direct connection between the East and Vienna.

Only in 1856 the foundation committee of the future share-holding company "Karl-Ludwig Kaiser-Royal Privileged Galician Railway" was formed, which offered four variants of a railway: 1. Przemyśl-Lviv; 2. Lviv-Brody; 3. Przemyśl - along the southern bank of the Dnieper to Chernivtsi and 4. Lviv - southwards to the third line. Lengthy negotiations and coordination with the central authorities and the management of the Northern Railway Company (because this Company had the prior right to purchase already built and develop new lines in Galicia) led to the fact that on April 8, 1858, the final so-called new or additional concession was given. According to the latter, the Karl-Ludwig Railway Company took the commitment to build only the main Przemyśl-Lviv line.

³⁸ Ihor Zhaloba. "Brody chy Chernivtsi: Vybir Napriamku Zaliznychnoi Mahistrali na Pivnichnomu Skhodi Habsburzkoj Monarkhii ta Bukovyny v 50-kh rokakh – na pochatku 60-kh rokiv XIX st.", *Naukovyi Visnyk Chernivetskoho Universytetu* 96-97 (2000): 124 [in Ukrainian].



Side branches Lviv-Brody and Lviv-Chernivtsi were considered optional³⁹. On November 4, 1861, the Company built the first railway in Eastern Galicia in the direction Przemyśl-Lviv, which became an integral part of the railway Krakow-Dębica-Przemyśl-Lviv⁴⁰. The construction of this railway gave the Bukovinian Chamber grounds to substantiate the feasibility of this project and it approved the need for extension of the tracks to Bukovina and acceleration of their construction. This was a very correct and a very necessary decision because among all the crown lands of the Austrian Empire, only Bukovina and Transylvania did not have railway tracks and the absence of railway communication negatively affected the overall economic development of the Empire because it could not provide excessive food products and transportation of livestock from Bukovina and Galicia to Austria. At the same time, the Bukovinian Chamber emphasized the more important state-political and strategic importance of the Lviv-Chernivtsi railway mainline.

Here is the statement of I. V. Zhaloba in this regard: “It should be noted that the Austrian government was already well aware of the importance and necessity of extending the Krakow-Lviv line to Chernivtsi with the further prospects for its development. A telling fact in this respect is that during negotiations in 1856-1857 between representatives of the Karl Ludwig-Bahn Railway Company and the Central Defense Commission (which evaluated railway projects from a military-strategic point of view), the Commission insisted on the construction of the Przemyśl-Stryi-Stanislaw-Chernivtsi line and only then the Przemyśl-Lviv-Brody line. In the end, in the first turn, it was decided to build the Permysl-Lviv railway⁴¹. I. V. Zhaloba in his articles “Brody or Chernivtsi: choice of the railway direction in the northeast of the Habsburg Monarchy and Bukovina in the 1850s – early 1860s” (2000) and “Discussion of the draft law on the promotion of building the Lviv-Chernivtsi railway in the Austrian parliament and its socio-political reaction (autumn 1863)”⁴² very thoroughly describes both projects for the construction of a railway to Bukovina and Brody. These publications give evidence of the importance of building a railway first to Lviv and from Lviv

³⁹ Gerhard Geyer. *Der Ausbau der nordöstlichen Eisenbahnnetzes der Osterreichsch-Ungarische Monarchi unter Berücksichtigung von Krisenzeiten* (Wien, 1954), 145.

⁴⁰ Petro Lazečko, “Arterii Dorog: Z Istorii Budivnictva Zaliznic’ u Skhidnij Galichini”, *Zhovten’* 11, (1987): 115 [in Russian].

⁴¹ Ihor Zhaloba. “Brody chy Chernivtsi: Vybir Napriamku Zaliznychnoi Mahistrali na Pivnichnomu Skhodi Habsburzkoj Monarkhii ta Bukovyny v 50-kh rokakh – na Pochatku 60-kh Rokiv XIX st.”, *Naukovyi Visnyk Chernivetskoho Universytetu* 96-97 (2000): 123 [in Ukrainian].

⁴² Ihor Zhaloba. “Obhovorennia Proektu Zakonu Shchodo Spryiannia Lvivsko-Chernivetskii Zaliznytsi v Avstriiskomu Parlamenti ta Yoho Suspilno-Politychnyi Rezonans (osin 1863 r.)”, *Istoryko-Politychni Problemy Suchasnoho Svitu* 8 (2001): 155 [in Ukrainian].

to Chernivtsi. As far as there were only two possible mainline extensions from Lviv: to Brody or Chernivtsi, all heated discussions were around them.

For example, on February 13, 1862, the “Bukowina” newspaper gives the following response to these plans: “Only one city of Brody alone competes with the entire Duchy of Austria and the united principalities of Moldova and Wallachia... without even one vote from Bukovina or Moldova, expressed in the interests of the Motherland, there was a threaten to lose the involvement in European world trade, or at least place the project of Brody under a reasonable doubt!”⁴³. Supporting the idea of the Lviv-Chernivtsi railway, the newspaper proceeded from the trade interests of Eastern Galicia and Bukovina and a large number of tourists travelling in that direction as well as the state interests of the Monarchy. “At all events, even a blind can see where the eastern way of European world trade leads to Volhynia or Galati”⁴⁴. Addressing the landowners of Bukovina, the newspaper emphasized their “commendable desire to raise the region spiritually and materially,” hoping that they would continue this tradition.

Continuing the subject of the newspaper, I. V. Zhaloba notes: “As we can see, both the people of Brody and the “Bukowina” newspaper emphasized mainly the general state interests and the interests of the railway company. Such passages, stating the profitability of future railway lines both for railway societies as well as for the region or state were traditional for that time. They should have provoked an interest or strengthen the understanding of the need for such lines in the two main factors of this process – the railway company, which had to build and maintain the line, and the state, which could facilitate this, or undertake the construction and operation as a whole. At the same time, everyone defended his right to be a pioneer in laying his railway, the construction of which had to be started immediately or soon and the rejection of his proposal was considered almost as a fatal nationwide mistake. Such kind of confrontation was also a characteristic phenomenon of that time. It was explained by the fact that there was an extremely widespread belief in the magical power of a railway and almost all the further development of a certain region, province, territory, district, etc. was made dependent on its presence or absence. That is why there was a keen struggle for the right of priority in laying railways in one or another direction»⁴⁵.

⁴³ “Landes- und Amts- Zeitung”, *Bukowina*, 13 ЛЮТОГО 1862, 3.

⁴⁴ “Landes- und Amts- Zeitung”, *Bukowina*, 13 ЛЮТОГО 1862, 4.

⁴⁵ Ihor Zhaloba. “Brody chy Chernivtsi: Vybir Napriamku Zaliznychnoi Mahistrali na Pivnichnomu Skhodi Habsburzkoi Monarkhii ta Bukovyny v 50-kh Rokakh – na Pochatku 60-kh Rokiv XIX st.”, *Naukovyi Visnyk Chernivetskoho Universytetu* 96-97 (2000): 130-31 [in Ukrainian].



Of course, each of the lines that competed for the allocation of funds for its construction hoped for its continuation in the future. Thus, the Lviv-Chernivtsi line hoped for the extension of the railway through the territory of the Danube principalities through Iasi to Galati and the Lviv-Brody line through Volhynia deep into the Russian Empire. It would be easier to find funds for quick completion of the construction of one of the lines for the second line Lviv-Brody, because it was less expensive and, in addition, had a shorter length. Neither Eastern Galicia, nor Bukovina, nor Vienna had sufficient funds to build the Lviv-Chernivtsi railway. In addition, the Danube principalities did not have funds to build a railway through the territory of Moldova. Therefore, the main hopes were resting on attracting foreign capital, first of all British. However, because of the political instability in the Danube principalities, the foreign capital was cautious about that region and was reluctant to invest in precarious businesses. This was the reason why the construction of the Lviv-Chernivtsi railway was constantly delayed⁴⁶. Moreover, among the mentioned reasons the situation in Bukovina itself should be added: except for the Chamber of Commerce and Industry, other societies of the region and representative offices did not represent a proper initiative. On this occasion there is a correct statement in the Lviv “Lemberger Zeitung” newspaper of September 9, 1862: “although a Bukovinian nobleman supports the construction of railways and their laying in a neighbour country, he is unwilling to give (for railway construction) lands and invest in shares; a burgher and a peasant do not have any wealth and therefore it is idle to expect their readiness for donations”⁴⁷.

Finally, the choice fell on the Lviv-Chernivtsi railway. The circumstance that prevailed, in the end, was the Polish uprising in the early 1860s in the Russian Empire. For this reason, the Russian government did not carry out railway construction in the region and the extension of the Lviv-Brody railway was postponed indefinitely. To this circumstance, the following considerations should be added, which were undoubtedly taken into account by the Austrian Government. The change in the trade and transport situation at the beginning of the second half of the 19th century led gradually to a shift in the direction of trade, in particular through Brody. As far as the city, as noted, was not industrially developed, it did not represent any interest to the government and big capital. On the contrary, laying the Lviv-Chernivtsi railway over the territory of Eastern Galicia and Bukovina made it possible to attract a much larger productive part of the region to the transport sphere of the railway, even on the

⁴⁶ Isidor Prodan. *Bukovinskie Oчерki* (Har'kov: Mirnyj Trud, 1914), 34 [in Russian].

⁴⁷ Lemberger Zeitung, (September 9, 1862): 6.

Austrian territory. Also, it was possible to count on a much larger cargo volume than in the Lviv-Brody line. In addition to traditional agricultural and forestry products, the development of metallurgy in Southern Bukovina was also taken into account, because the reports on industrial metal deposits there were quite optimistic at that time. In addition, the comparison of the endpoints of the branches Brody or Chernivtsi was not in favour of the first one. Chernivtsi, the capital of the Duchy, had all the signs of growth, which at the same time could not be said about Brody.

From the point of view of strategic and state-political interests of the government, the Lviv-Chernivtsi line was also more profitable, as it provided an outlet to two borders at once: the Russian and the Moldavian. In addition, the Danube principalities were considered as the most attractive area for the economic expansion of Austria, in fact, the only region at that time, where it could compete successfully with other European countries⁴⁸.

The main motivation to accelerate the railway construction in Eastern Galicia and Bukovina consisted in the fact that Austrian railways in the centre of the Monarchy could only become profitable when they could connect the railways with Galicia and Bukovina and “get closer to the East” (to Russia and Romania). In this process, the Bukovinian Chamber of Commerce and Crafts was especially active after the first railway Przemysł-Lviv line was opened in Eastern Galicia on November 4, 1861. As is known, it extended the Krakow-Debica mainline and received the name of the “Krakow-Debica-Przemysl-Lviv” line. This mainline was built by the joint-stock railway company “Karl Ludwig Kaiser-Royal Privileged Galician Railway”⁴⁹.

Therefore, for many years, the Austrian government focused its attention on the painful problem of laying the necessary railway between the centre of the Austrian Empire and Chernivtsi. This was predetermined by the need in linking economically and politically disparate parts of the Austrian Empire. This is what Baron Tornau, the Russian military attache in Vienna, said on this issue: “Being aware of a great danger posed by the moral unity of the constituent parts of the Empire, the Austrian government spared neither labour nor costs to establish a material connection between them which could balance the disadvantages of the ethnographic position of the state. Believing that railways are one of the most effective means, he used a large part of public resources to build

⁴⁸ Ihor Zhaloba. “Brody chy Chernivtsi: Vybir Napriamku Zaliznychnoi Mahistrali na Pivnichnomu Skhodi Habsburzkoii Monarkhii ta Bukovyny v 50-h Rokakh – na Pochatku 60-h Rokiv XIX st.”, *Naukovyi* 96-97 (2000): 132 [in Ukrainian].

⁴⁹ Petro Lazechko. “Arterii Dorig: Z Istorii Budivnictva Zaliznic’ u Skhidnij Galichini”, *Zhovten’* 11, (1987): 115 [in Russian].



them, and missing funds were supplemented by foreign capitalists⁵⁰. There is no need to underscore, that the construction of railways in Bukovina helped Austrian entrepreneurs to significantly increase the delivery of their products to Bukovina markets. At the same time, the central Austrian enterprises were provided with the cheap raw materials they needed.

The construction of railways in Bukovina was also in the military and political interests of the Austrian Monarchy in the south-eastern region of Europe because by laying the railways, the Austrian government provided itself with a favourable strategic position on a possible battle-ground. It is clear that thanks to rail transport, the Austrian General Staff could at any time quickly and in a sufficient number to concentrate its troops on the borders with the Russian Empire and Romania. And during the war, the railways, in general, provided great opportunities for troop manoeuvres, their provision, etc. At the same time, due to the railways, the Austrian Empire planned, and thus carried out political and economic enslavement of the peoples living here in Eastern Galicia and Bukovina. Practically, thanks to the railways, as well as the waterways and in particular the Danube, Austrian industrial goods were sent to south-eastern Europe, as well as political pressure from the Austrian government was imposed⁵¹.

After the first railway between Lviv and Chernivtsi had been built, the government of the Austrian Monarchy continued to show its interest in the development of railway transport in Eastern Galicia and Bukovina. In the centre of the Austrian Empire, it was understood that the absence of rail connections with Bukovina and Transylvania caused significant damage to the overall economic development of the Empire – any possibility to deliver products from the so-called “crown lands” was limited. The local business societies in Galicia and Bukovina, who constantly apply for the further extension of the railway lines further from Chernivtsi, also did not sit on their hands.

The rapid pace of the transport revolution in the advanced capitalist countries demonstrated an enormous economic, political and military-strategic importance of railways to the world, which forced the Austrian government to deal even more with railway issues in the Habsburg Empire. That is why the Lviv-Chernivtsi-Iasi railway would best meet the abovementioned conditions as an outlet to the Black Sea.

As is known, the Lviv-Chernivtsi railway was built by the Joint Stock Company “Kaiser-Royal Privileged Lviv-Chernivtsi Railway”. Therefore, even dur-

⁵⁰ “Lvovskaya Zheleznaya Doroga Ministerstva Putej Soobshcheniya”, 1976, Ark.1., R-2037, Derzhavnyi Arkhiv Lvivskoi Oblasti [in Russian].

⁵¹ Nikolaj Meledin. “Gosudarstvenno-Strategicheskoe Znachenie Stancii Galac Pri Bendero-Galickoj Zheleznoj Doroge”, *Pravda* 3 (1880): 25 [in Russian].

ing the construction of the Lviv-Chernivtsi mainline, the Company planned the possibility of extending this mainline to the borders of Bukovina with an outlet to the Black Sea. This possibility was especially thoroughly studied by the leaders of the Company – Victor Ofenheim, Leon Sapieha and the Englishman Thomas Brassey. They saw two possible extensions of the railway from Chernivtsi – through Novoselytsia to Bessarabia to Odesa and through Southern Bukovina (the territory of present Moldova) to Galati, Romania. I.V. Zhaloba describes this process as follows: “Thus, even before a shovel touched the ground on the Lviv-Chernivtsi line, it was clear to everyone that this railway was considered only as an intermediate stage in a “big leap” to the warm waters of the Black Sea. As the case with the extension of the railway through Novoselytsia to Odessa was not as successful as desired, it was decided to stop in the direction of Moldova. Indeed, from the press, it became known about the intention of the consortium headed by Sapieha to build a railway from Sniatyn to Bucharest. In the case of this project fulfilment, the section from Sniatyn to Chernivtsi turned out to be only a side dead-end line, Chernivtsi remained beyond of great trade and transport traffic, and the further extension of the railway from the regional capital to the south of the region to Suceava was postponed indefinitely. It is quite natural that this information caused a great concern in Bukovina, and on October 22, 1866, V. Alt, the President of the Bukovina Chamber of Commerce and Industry convened its members for a special meeting. It ended in the appeal on behalf of the Chamber to the Ministry of Trade, in which demand was put on giving a concession to the mentioned consortium only if Chernivtsi would be the starting point of the railway”⁵².

Choosing one of the directions that would extend the Lviv-Chernivtsi railway was an interesting and at the same time developmental experience. Already at the first meeting on May 30, 1865, the shareholders of the Lviv-Chernivtsi railway considered the issues on advantages and disadvantages of each of the future directions of the extension of the main railway line in Bukovina. Here, the preference was given to the Odessa direction, although the direction to Galati also offered prospects of getting “a very favourable profit»⁵³. The fact is that the first direction through Novoselytsia to Chisinau and Odessa was more acceptable both in terms of political and economic advantages for Austria, as well as in terms of purely technical characteristics of railway construction: the line would be laid mainly on the plain surface. In such a way, the Austrian Empire

⁵² Ihor Zhaloba. “Na Shliakhu Do Chornoho Moria: Z Istorii Rozbudovy Lvivsko-Chernivetskoi Zaliznytsi Do Suchavy i Yass”, *Zelena Bukovyna* 1-2 (2000): 38 [in Ukrainian].

⁵³ “Avstro-Uhorshchyna”, 1918, Spr.99. Ark.33, 428, Tsentralnyi Derzhavnyi Viiskovo-Istoriichnyi Arkhiv Rosii (Moskva) [in Russian].



would get a direct and short outlet to the ports of Odessa, and Austrian entrepreneurs could significantly expand sales of their products not only in South-east Europe but also reach Asia. As a result, more Austrian ships would sail at the Black Sea, and hence more foreign trading houses would appear in Odesa.

Along with gaining such advantages, the Austrian Monarchy turned into a serious competitor for Russia, as far as using a railway, Austrians would be able to quickly and suddenly concentrate their troops on the border with Russia and even capture the port of Odesa. Moreover, as far as the railway network in that southern part of the Russian Empire was developed poorly, a significant part of Russian troops would remain on the left bank of the Dniester⁵⁴. Therefore, about half a year later, on September 6, 1864, at a special meeting of the Council of the Company, the issue of extending the Lviv-Chernivtsi mainline to the Black Sea was very urgently considered again. Such an urgent meeting was predetermined by the fact that the Russian government was approached with a proposal to build a railway from Odessa to the Austrian border by the French Railway Association. At the same time, the Russian government itself began to build a railway from Odessa to Chisinau⁵⁵. Therefore, the Austrian Company resumed active negotiations with the Russian government to obtain concessions for the construction of a railway from Odessa to Chisinau and further to the Austrian border. About a month later, in October 1864, the claims of the Lviv-Chernivtsi Railway Company were even supported by the Novorossiysk and Bessarabian Governor-General P.E. Kotzebue, and a month later the Company's proposals were considered by the Central Administration of Public Buildings of the Russian Empire. The project of building a new railway, prepared by the director of the Lviv-Chernivtsi railway, pointed out the importance of opening sales of Bessarabian bread for Russia through the port of Odesa and directing the Austrian transit traffic through the Russian provinces and Odesa to the Black Sea. However, the draft agreement contained several such requirements, which previously were not expressed to Russia by any foreign company⁵⁶.

The Russian government did not make a final decision immediately but decided to conduct a series of exploration works. Austrian engineers refused to cooperate with Russian colleagues. The same plans presented by them were mostly false. This situation was best described by the Russian engineer O. O. Golovachev: "Ofenheim's proposal fully characterizes the view of foreign swin-

⁵⁴ Petr Andreev. *Yugo-Zapadnye Zheleznye Dorogi: Istoriko-Ekonomicheskij Oчерk* (Kiev: Tipografiya S.V.Kul'zhenko, 1896), 133.

⁵⁵ Timofej Florinskij. *Zarubezhnaya Rus' i Ee Gor'kaya Dolya* (Kiev, 1900), 15 [in Russian]

⁵⁶ "Aktционерne Tovarystvo Zaliznytsi Lviv-Chernivtsi-Yassy", 1870, Op.1, Spr.3, Ark.63-69, 297, Derzhavnyi Arkhiv Chernivetskoj Oblasti [in Ukrainian].

dlers on our business world. People like them probably thought that we, due to the need for railways, would not be able to appreciate the benefits that they were able to provide to the uncivilized people from the North. They go so far in their impertinence that does not even find it necessary to determine the length of the railway more precisely or consider it possible to increase it by as much as a quarter, so they also do not consider it necessary to specify the amount of capital, hoping that we can swallow this bait as well, and they will use those funds to cover their expenses on the construction of a railway from Lviv to our border. But such an impertinence of those swindlers does not stop even on that. They demand a right for ownership on the railway for 90 years from the beginning of traffic opening, construction of a railway with a track gauge as on the Austrian railways, free allocation of land near the port of Odesa for building warehouses and shops; exemption from all dues and taxes in that area and, finally, special jurisdiction to resolve misunderstandings between the Company and the government, i.e. the arbitral tribunal in one of the foreign embassies. It is quite strange that people allow themselves to make such proposals relying on some success, but even more surprising that these proposals are seriously discussed and twice submitted to the Committee of Russian Railways, although in a modified form”⁵⁷.

According to archival documents, Ofenheim’s proposals were indeed considered in 1865-1866 at five meetings of the Railway Committee and two meetings of the Council of Ministers. In addition to the arguments provided by O.O. Golovachev, there were also those that we presented earlier. Indeed, in the case of connecting the Lviv-Chernivtsi railway with Odesa through Novoselytsia and Chisinau, Austria would gain several advantages in the region, and Russia would get a dangerous competitor. Therefore, taking into account the set of facts and based primarily on their interests, on October 28, 1866, the Russian government finally rejected that proposal and preferred to build the Kyiv-Balta railway with a branch to Lviv⁵⁸.

Thus, because of their own insolent and inconsiderate actions, the Lviv-Chernivtsi Railway Company failed in tsarist Russia. However, cunning Ofenheim had a backup plan, which is building a line to Suceava, Romania. Already

⁵⁷ Aleksej Golovachev. *Istoriya Zheleznodorozhnogo Dela v Rossii* (Sankt-Peterburg, 1881), 80 [in Russian].

⁵⁸ “Sluc’kij Grods’kij Sud”, 1958, Op.44. Spr.667. Ark.2-12, 442, Tsentralnyi Derzhavnyi Istorichnyi Arkhiv Ukrainy; Petr Andreev, *Yugo-Zapadnye Zheleznye Dorogi: Istoriko-Ekonomicheskij Oчерk* (Kiev: Tipografiya S.V. Kul’zhenko. 1896), 133 [in Russian]; Viktor Virginskij, *Vozniknovenie Zheleznyh Dorog v Rossii Do Nachala 40-h Godov XIX Veka* (Moskva, 1949), 256 [in Russian].



on May 15, 1867, thanks to Ofenheim, who took an advantage of an unstable political situation in the Austrian Empire (because Kaiser suspended the activity of the parliament), the Company obtained the desired concession (from Latin – permission, agreement) from the government to build a section of the Chernivtsi-Suceava railway. The Austrian state guaranteed the Company a net profit for 700,000 florins in silver on this mainline and an exemption from taxable income for 9 years from the moment of the railway opening. Englishman T. Brassey was responsible for the construction of this section. During the construction of the Lviv-Chevrnivtsi mainline, the Englishman undertook a commitment to contribute half of the capital needed for the construction and did that by reacquisition of senior bonds.

Without going into all twists and turns of the preparatory period, which were analyzed in detail by I.V. Zhaloba in his article “On the way to the Black Sea: from the history of the construction of the railway Lviv-Chernivtsi to Suceava and Iasi”⁵⁹, we should note that the construction of the Chernivtsi-Suceava section, started in the autumn of 1867, had rapid progress. October 28, 1869, 5.58 PM. From Suceava, a train to Chernivtsi departed, which started the movement on this section of 89.9 km⁶⁰. The train passed one station after another: Chițcani, Gatga, Mileseuci, Ishtensegits, Hadikfalva, Cherepkivtsi, Hlyboka, Kuchurmare (now Velykyi Kuchuriv), Volksgarten (now Pivdenna station) and reached the Chernivtsi railway station⁶¹.

We have already noted that the extension of the railway from the Austrian border to one of the Black Sea ports, in particular to Galati was in the interests of the government of the Austrian Monarchy, as well as in the interests of the Lviv-Chernivtsi Railway Company. The Director-General of the Lviv-Chernivtsi Railway V. Ofenheim cherished that idea since the early 1860s. Here he also had good luck – in June 1868 he managed to obtain a concession for the construction of the Suceava-Iași railway of 179.5 km length (initially Suceava-Chițcani-Roman of 102.9 km length and Parcani-Iași of 76.6 km), and hence, the side Verești-Botoșani branch (44.5 km). The total length reached 223 km. I. V. Zhaloba describes this process as follows: “Although the Company did not get a direct outlet to Galati, the Lviv-Chernivtsi Railway was no longer threat-

⁵⁹ Ihor Zhaloba. “Sporudzhennia Zaliznychnoi Mahistrali Lviv- Chernivtsi- Yassy (Seredyna 60-kh – Pochatok 70-kh Rokiv XIX st.)”, *Tvorchi Vershyny Vchenoho: Zbirnyk Naukovykh Prats, Do 60-Richchia Vid Dnia Narodzhennia Doktora Istorychnykh Nauk, Profesora M. H. Kukurudziaka, № 1 (1998): 100 [in Ukrainian].*

⁶⁰ *Czernowitzer Zeitung* (14.08.1869): 4.

⁶¹ *Hauptbericht und Statistik über das Herzogtum Bukowina für die Periode vom Jahre 1862-1871* (Lemberg, 1872): 342.

ened by the fate of a dead-end railway. The terms of the concession were very favourable. The Romanian government guaranteed the concessionaires the right of expropriation, financial assistance during the construction for 40,000 francs per kilometre, a ten-year exemption from taxes and import duties and an annual profit of 37,432,550 francs (which was equal to 14,973,000 florins in silver). On July 13, 1868, another construction contract was concluded with Thomas Brassey, similar to that concluded for the construction of the Suceava Railway, and in the summer of the same year, the construction of Romanian lines immediately began. The fifth special meeting of shareholders, held on October 15, 1868, unanimously supported the acceptance of concessions given by the Romanian government and for renaming of the Privileged Lviv-Chernivtsi Railway Company to the Privileged Lviv-Chernivtsi-Iași Railway Company with the corresponding changes in the statute⁶². The company of T. Brassey carried out a rapid construction and reached Roman at the mark of 102.9 km on the territory of modern Moldova within a month. On June 1, 1870, the Parcani-Iași section (76.6 km) was completed. However, the side Verești-Botoșani line (44.5 km) was commissioned only on November 1, 1871⁶³. Thus, the total length of the main railways' extension crossing the territories of Eastern Galicia, Bukovina and Romania reached 579.6 km.

The joint-stock company "Kaiser-Royal Privileged Lviv-Chernivtsi-Iași Railways" lost the right to build a railway up to Galati and, accordingly, an outlet to the Black Sea. For lack of funds, it was failed to implement the concession of 1872⁶⁴. As a result, the Prussian financier Henry Strousberg, taking advantage of the new parliamentary elections in Romania and the change in the Romanian government, took over the joint-stock company "Romanian Railways" founded by himself and the right to build the Roman Galati railway and its extension to Brăila-Buzău-Vârciorova⁶⁵.

"Thus, the event, to which both the government circles of Vienna and the management of the Lviv-Chernivtsi railway were striving for, had happened: for the first time, the ports of the Baltic and North Seas were put into direct communication with the Black Sea. This connection passed through the Austrian

⁶² Ihor Zhaloba. "Na Shliakhu Do Chornoho Moria: Z Istorii Rozbudovy Lvivsko-Chernivetskoi Zaliznytsi Do Suchavy i Yass", *Zelena Bukovyna* 1-2 (2000): 42 [in Ukrainian].

⁶³ "Aktционерne Tovarystvo Zaliznytsi Lviv-Chernivtsi-Yassy", 1870, Op.1, Spr.3, Ark.63-69, 297, Derzhavnyi Arkhiv Chernivetskoi Oblasti [in Ukrainian].

⁶⁴ Ivan Feshchenko-Chopovskij, *Promyshlennost' i Prirodnye Bagatstva Galicii* (Kiev: Tip. A. M. Ponomareva, I. I. Vrublevskogo, 1915), 22 [in Russian].

⁶⁵ Stal'nym Magistralyam Moldavii 100 let (Kishinev: Kartya. Moldavenyaske, 1971): 229 [in Russian].



territory and was possible due to the Austrian Railway, which, moreover, had its lines on the territory of Romania. «The connection of the Austrian and Romanian railways occurred at a point desired by the Austrians, and the conditions under which the Romanian government granted a concession to the Austrian and English applicants were extremely favourable» concluded I. V. Zhaloba⁶⁶.

Undoubtedly, the construction of the Lviv-Chernivtsi-Iași railway was a remarkable event and had an important economic, political and strategic importance. The Lviv-Chernivtsi-Iași railway became an important link in the Eastern European network of railways, and it was used to provide a constant link between the countries of Eastern and Western Europe. Thanks to the signing of an agreement with the Romanian government on the connection of the Lviv-Chernivtsi-Iași railway with the Romanian railway network, the Company gained an outlet to Galati. At the same time, this railway became a kind of channel, which helped the Viennese government to monitor everything that had been done in Galicia and Bukovina and on the outskirts of the Habsburg Monarchy.

Conclusions

The rapid pace of the transport revolution in the advanced countries, which demonstrated a gigantic economic, political and military-strategic importance of the railways to the world, forced the government of the Habsburg Monarchy to deal with the railway issue very seriously. The construction of railways in Bukovina was also in the political and socio-economic interests of Austria in the south-eastern region of Europe because by laying the railways, the imperial government provided itself with a favourable strategic position in the region. During the construction of the Lviv-Chernivtsi-Iași main railway line, railway communications came to the first place in the Austro-Hungarian Empire in terms of material and technical potential and defense and economic importance time. Three fundamental factors had a decisive influence on the operation of this railway: 1) integration of the ways of communication in Bukovina with the general transport network of Austria-Hungary; 2) miscalculations of Austrian railway companies regarding the terms of construction; 3) struggle of two opponents: private railway companies and the state. However, a circum-spect policy of the Austrian government regarding the material and technical support of the road and the tariff issue provided fulfilment of most of the tasks set before it through the communication network of the Empire.

⁶⁶ Ihor Zhaloba. "Obhovorennia Proektu Zakonu Shchodo Spriyanniia Lvivsko-Chernivetskii Zaliznytsi V Avstriiskomu Parlamenti ta Yoho Suspilno-Politychnyi Rezonans (osin 1863 r.)." *Istoryko-Politychni Problemy Suchasnoho Svitu* 8 (2001): 143 [in Ukrainian].

It was shown that private railways, as important transport arteries of Bukovina, had nationwide importance and played a significant role in the transport system of Austria-Hungary. They served the leading economic regions of Bukovina, acting in each of them as an integral part of the production. In other words, they were used to provide local, inter-industry and regional connections.

Rezumat

Acest studiu își propune să revizuiască condițiile socio-politice și economice ale creării și începutul funcționării principalelor căi ferate din Bucovina. Analiza literaturii științifice și a memoriilor, revizuirea surselor arhivistice a permis stabilirea faptului că problema formării și începutul rețelei de căi ferate din Bucovina din perioada austro-ungară nu a făcut obiectul unei investigații sistematice. Astfel autorii au arătat că ideea construirii căilor ferate în Bucovina era, de asemenea, în interesele politice și socio-economice ale Austriei în această parte a Europei, deoarece prin construcția căilor ferate, guvernul imperial s-a asigurat cu o poziție strategică favorabilă în regiune. Pe baza rezultatelor studiului, s-a stabilit că odată cu construirea căii ferate Lviv-Cernăuți-Iași, comunicațiile feroviare au ajuns pe primul loc în Imperiul Austro-Ungar în ceea ce privește potențialul material, tehnic, de apărare și economic.

Cuvinte cheie: căile ferate ale Bucovonie, Imperiul Austro-Ungar, rețele de transport, A. Ficker, G. Biedermann.

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Discursive Historical Continuities: Serbian Nationalist Discourse in the Printed Media on the Brink of the First Balkan War (1912) in Comparison with Today

Srdan M. JOVANOVIĆ

Abstract

This article explores the 1912 print media in Serbia in their relation to the Balkan Wars, comparing the nationalist topoi with the contemporary age and contemporary national groups. It analyzes the content of several articles printed in papers such as *Illustrated War Chronicle* (*Ilustrovana ratna kronika*) and the Serbian newspaper (*Srpske novine*), juxtaposing their discourse with contemporary Serbian nationalism. The primary sources from 1912 have not been discussed in scholarship, except a few mentions. It shows that after a century since the Balkan Wars has passed, the nationalist discourse has remained more than similar, using the same historical pathos of victimhood and “othering” of the Enemy.

Key words: *Ilustrovana ratna kronika*, *Srpske novine*, *Politika*, Serbia, nationalism.

*Farewell, father! Farewell, dear mother
I cannot stay here any longer
When the king calls to a vengeful battle!
Wait not for me, nor call me any more!
May God protect us! Farewell! God bless!
And weep not for my young life
Hurrah, comrades! To battle formations!
Under the bloody banner! Forward! Forward!*

Illustrated War Chronicle (*Ilustrovana ratna kronika*), 18 October 1912

Nationalism in the Balkans has been studied and analyzed extensively¹, with a plethora of works concentrating on Serbian nationalism in particular, from

¹ Brad K. Blitz. *War and change in the Balkans: nationalism, conflict and cooperation*, (Cambridge: Cambridge University Press, 2006); Milica Z. Bookman. „Economic decline and nationalism in the Balkans“, James F. Brown, *Nationalism, democracy, and security in the Balkans*, (Dartmouth Publishing Company, 1994); Karin Dyrstad. „After ethnic civil war: Ethno-nationalism in the Western Balkans“, *Journal of Peace Research* no. 49 (6), (2012): 817-831; Pavlos Hatzopoulos. „All that is, is nationalist: Western imaginings of the Balkans since the Yugoslav wars“, *Journal of Southern Europe and the Balkans* no. 5 (1), (2003): 25-38; Andrey Ivanov., *The Balkans divided: nationalism, minorities, and security*, vol. 1, (Frankfurt am Main: Peter Lang Publishing, 1996); Karin Dyrstad, „After ethnic civil war: Ethno-nationalism in the Western Balkans“, *Journal of Peace Research*, no. 49 (6), (2012): 817-831; Aleksandar Pavkovic. *The fragmentation of Yugoslavia : nationalism and war in the Balkans*, (New York: St. Martin's Press, 2000); Victor Roudometof and Roland Robertson. *Nationalism, globalization, and orthodoxy: the social origins of ethnic conflict in the Balkans*, vol. 89, (Greenwood Publishing Group, 2001).

myriad perspectives². Yet historical research into primary sources (in this case, media from the beginning of the 20th century) is an unending endeavour. In this article, we are concentrating on a corpus of newspaper articles published at the brink of the First Balkan War at the end of 1912. The media discourse that promoted Serbia's joining the war against the Ottoman Empire started by Montenegro (and later joined by Albania, Greece and Bulgaria) is a plentiful source of information on this topic. Juxtaposing the warmongering discourse of a century ago with the rather similar nationalist discourse of this day and age, we concentrate on the discursive elements that have remained almost identical for a hundred years.

Several primary sources are used in the content analysis, namely the 1912 editions of the *Politika* daily (edited at that time by Vladislav Ribnikar), the *Ilustrovana Ratna Kronika* (IRK, Serbo-Croatian for *Illustrated War Chronicle*), edited by Dr. Kamenko Subotić, printed by the *Svet* bookstore (owner F. Ognjanović) in Novi Sad, as well as the *Srpske Novine* (Serbian newspaper), at that time the official gazette of the monarchy, printed in the Royal State Press (*Kraljevska državna štamparija*). All the resources from 1912 were found in the National Library of Serbia (*Narodna biblioteka Srbije*) in Belgrade, where they exist in digital format as well. Whilst *Politika* was founded by Ribnikar himself in 1904, the IRK started coming out on 18 October 1912, specifically in order to report on the First Balkan War, as well as to engage in warmongering propaganda, which will be shown in the paragraphs to come. Contemporary resources are nowadays available online, as the Internet has become one of the primary means of disseminating such discourse.

Through the looking glass of the media

The media can be said to be “for most people the only way in which they ever encounter politics”³. In Chilton's words,

² Valere Philip Gagnon. „Ethnic nationalism and international conflict: The case of Serbia.“ *International security* no. 19 (3) (1994): 130-166. Sabrina Petra Ramet, „Nationalism and the ‘idiocy’ of the countryside: The case of Serbia.“ *Ethnic and Racial Studies* no. 19 (1) (1996): 70-87; Ivana Damjanović, Dragan Novaković, and Ivan Obradović. *Human rights in the shadow of nationalism: Serbia 2002*, (Helsinki Committee for Human Rights in Serbia, 2003); Wendy Bracewell, „Rape in Kosovo: masculinity and Serbian nationalism.“ *Nations and Nationalism* no. 6 (4) (2000): 563-590; Eric Gordy. *Kultura vlasti u Srbiji: nacionalizam i razaranje alternativa*, (Belgrade: Samizdat B92, 2001); Katja Kahlina, *Local histories, European LGBT designs: Sexual citizenship, nationalism, and „Europeanisation” in post-Yugoslav Croatia and Serbia*. Paper read at Women's Studies International Forum., Veličković, Vukša. „Homofobni nacionalizam i kriza maskulosti u Srbiji.“ *Sarajevske sveske* (39/40) (2012): 255.

³ Matthew A. Baum and Tim Groeling. „New media and the polarization of American political discourse.“ *Political Communication* no. 25 (4) (2005): 345-365.



“political parties and government agencies employ publicists of various kinds, whose role is not merely to control the flow of, and access to information, but also to design and monitor wordings and phrasings, and in this way to respond to challenges or potential challenges. The terms ‘spin’, ‘put a spin on’ and ‘spin doctor’ are terms that reflect the public belief in the existence of and significance of discourse management by hired rhetoricians”⁴.

Even though these particular instances have been exacerbated and strengthened with the development of the media and the rise of the mass media during the 20th century, the principle above is valid for the media of a hundred years ago as well – though the difference is in the fact that at the beginning of the 20th century, we are talking primarily about the press. In other words, “the proliferation of mass communication systems has probably simply amplified the importance of a function that is found not only in contemporary societies but also in traditional societies”.⁵ For that reason alone, the media are often dubbed the “fourth power”, as “media people act according to their interests and, for different reasons, very selectively pick out the events thought to be worth communicating to the public, thereby strongly influencing the perception and activities of all social actors involved in the system of public communication”⁶.

On these pages, we will concentrate on the media-centred nationalist discourse in Serbia on the brink of the Balkan wars in late 1912, drawing a parallel with contemporary discourse, with which numerous similarities will be shown. From a social constructivist point of view, it is of importance to realize that

“the media construction of reality, which signifies the active creation of a public and political agenda, does not here simply formulate the dominant public opinion and the apparent consensus on the subject, but also – in the mutual complementing of media and other discourses – actively lays down the foundation, the primary principles and the legitimacy for the implementation of national and local policies”⁷.

These policies were nationalist both a century ago and today, with the difference that the 1912 discourse can be classified as outright warmongering. A

⁴ Paul A. Chilton. *Analyzing Political Discourse - Theory and Practice*, (London: Routledge, 2004).

⁵ Chilton. *Analyzing Political Discourse*.

⁶ Siegfried Jäger and Jürgen Link, *Die vierte Gewalt. Rassismus und die Medien* (Duisburg: DISS, 1993).

⁷ Vlasta Jalušič. „Xenophobia or self-protection? On the establishing of the new slovene civic/citizenship identity”, *Xenophobia and Post-Socialism*, ed. Mojca Pajnik (Ljubljana: Peace Institute, 2002).

socially and politically significant policy such as the war against another country needs strong backup and propaganda by those who wish to implement it, and in such an atmosphere, “the media *poiesis*, one of the main components for creating public policy, acts as a motor for the discourse of ‘normality’ and the normalization of certain problematic methods of public acting. Through methods of differentiation and distinction it successfully delineates the boundaries of ‘acceptability’ for the mainline of collective political acting – both by individuals and institutions”⁸.

The Kosovo trope

The *Illustrated War Chronicle* reported (for lack of better words at the moment) in a strong, belligerent fashion, pregnant with Kosovo-based nationalism. Even in its first issue (18 October 1912), the year 1389 could be seen printed out on the upper left corner, indicating a strong connection to the almost mythical Battle of the Kosovo Field (Ser-Cro. *Boj na Kosovu, Bitka na Kosovu Polju*) that took place in what is today the fledgeling state of Kosovo in the year 1389, the unending source of Serbian nationalism even in this day and age. As the following examples shall show, most of the discourse of the IRK concentrates on the mythical trope of the Battle of Kosovo, which will not differ overly from the nationalism of the end of the 20th and the beginning of the 21st century in Serbia. There has been a plentiful scholarly production on the topic of Kosovo-based Serbian nationalism⁹. In order to properly understand it, the Kosovo trope needs to be historically contextualized.

What is known is that in the 14th century, which was the time when the Ottoman Empire expanded to the West and conquered most of the Balkans, what is often considered as the “medieval Serbian state” was located in today’s regions from Šumadija (bordering with the rivers Sava and Danube) on the north, including today’s Kosovo, and during the reign of Dušan the Strong (*Dušan Silni*, +1355) even into the south, to include portions of Byzantium, today’s Albania, Macedonia and a significant part of Greece (*nota bene*: the state was not even known as “Serbia” at the time, though, - its name was *Raška*. From the point of view of political science and history, we also have to take care not to understand the *medieval* concept of the state in the same manner as we see the “state” today). As Trgovčević wrote,

⁸ Jalušič, *Xenophobia or self-protection...*

⁹ Philip E Auerswald. „The Kosovo conflict: a diplomatic history through documents.” *Refugee Survey Quarterly* no. 20 (3) (2001); Židas Daskalovski. *Claims to Kosovo: Nationalism and Self-Determination. Understanding the War in Kosovo*: (2003): 13-30; Denisa Kostovicova. *Kosovo: The politics of identity and space* (Routledge, 2005).



“on 28 June 1389 ... this field was the scene of battle between the Turks who were penetrating the Balkans, and Serbs, whose medieval state was located there. According to all evidence, the battle was very violent, and both rulers – Turkish Sultan Murat I and Serbian Duke Lazar Hrebeljanović – perished in it, as well as many soldiers on both sides. During the history Serbs were considered as having lost the battle”¹⁰.

This battle played a key role in the romanticized national myth-making of the 19th century, and the following analysis will show that it held a central place in nationalist and warmongering discourse both at the beginning of the 20th century, as well as a hundred years later. “The death of the last great Serbian ruler there, and the fact that after that battle the Serbian state started to collapse were conducive for the emergence of the cult. Thus, Kosovo became synonymous with the state’s downfall and subsequent slavery over the centuries”¹¹, which will result then in the “five hundred years of the Turkish yoke” trope (debated later). “Through chronicles, notes and oral tradition the legend gradually evolved, over time greatly exceeded the significance of the battle and its consequences and spread throughout the territories populated by Serbs, and even among some neighbouring nations”¹², reaching the status of a historical and political myth. In Kaser’s¹³ words,

“above all myth serves to represent historical continuity and enforce the consciousness of the ethnic or national community. Those who are initiated into and accept this created historical heritage come to feel strongly linked to their liminalized mythic ancestors. In the case we are considering here, that of Serbia, the projected effect is that of a spiritual kinship group, sanctified by history and religion with an eternal history.”

The moment that Kaser identified as “eternal” was half of a millennium at the brink of the Balkan Wars, and over six centuries today, as the reverberations of the “sanctified history” are still strong, as within the “Kosovo pathos”, “the ritual of remembrance symbolizes for many Serbs the ethnic entity of Serbdom, being Serbian and the fight for survival. An essential meaning of Kosovo field is that survival does not depend on victory; even a defeat can be mythologized as the beginning of a period of the never-ending struggle for

¹⁰ Ljubinka Trgovcevic. *The Kosovo Myth in the First World War* (Projekat Rastko Gracanica-Pec, 1999).

¹¹ Trgovcevic. *The Kosovo Myth in the First World War...*

¹² Trgovcevic. *The Kosovo Myth in the First World War...*

¹³ Karl Kaser and Joel M Halpern. „Historical myth and the invention of political folklore in contemporary Serbia,“ *Anthropology of East Europe Review* no. 16 (1) (1998): 89-107.

survival, one's folk against all others"¹⁴. Many of the abovementioned instances have played important roles in warmongering and nationalistically oriented discourse at the beginnings of the 20th and early 21st centuries, respectively. Besides the frontally positioned the year of 1389, the very first issue of the IRK (18 October 1912) boasts a poem about vengeance for Kosovo on its very first page, called "A hail to Serbian kings":

King Petar, king Nikola,
Avengers of the Tzar and Kosovo!
Look at the Serbs, the falcons,
All over the Serbdom wide
As they await you eagerly,
When you shall rise brotherly
And raise the holy Jugović standard,
And draw the saber of the Obilićs,
And shout to Serbian heroes:
„Serbs, brothers, chosen heroes!
„The days of want have already come
„To seek for what once was Serbian
„To avenge the tzar and Kosovo!
„It is the wish of every Serb,
„To retake the tzardom of Dušan!
„Amen, God, quickly, if God allows it!“

Revolving around the trope of the Battle of Kosovo (punctuation given identical to the original within the translation), the poem (of questionable artistic merit) mentions the paradigm "Serb" seven times within the 16-line long-form, while "avenging Kosovo" gets mentioned twice. Having in mind that the Battle of Kosovo was considered to be lost, the idea of vengeance can be seen more than often in discourses revolving around it. Kosovo is seen as a lost land, that needs to be reacquired. In Mišković's words, "the slogan 'Revenge for Kosovo' continued to be the Serbian elite most powerful instrument to mobilise the population"¹⁵, both literally and metaphorically, both at the beginning of the 20th as well as of the 21st century. As Trgovčević noticed,

"the cult (of Kosovo) particularly flourished during the First Balkan War in 1912, when Kosovo was liberated from Turks and again annexed to the Serbian state. Everywhere in public, it was spoken that the testament of forefathers

¹⁴ Kaser and Halpern. „Historical myth and the invention of political folklore in contemporary Serbia...“

¹⁵ Nataša Mišković. *Mission, Power, and Violence: Serbia's National Turn* (IB Tauris, 2011).



has been fulfilled and revenge awaiting for nearly five centuries done. Gustav Gesemann noted: ‘That is Kosovo, the grave of an old Serbian freedom; that is Kosovo, the realization of the new Serbian freedom since 1912, Kosovo whose earth soldiers used to kiss and carry back home in bags, to show to their wives and children.’¹⁶

Drawing a tangent to the beginning of the 21st century, we still see a very similar discourse, revolving around the year 1389, which has sustained an almost fully mythological level. One of the innumerable Serb nationalist movements has even used the year for its very appellation, such as the SNP1389 (*Srpski narodni pokret 1389*, ‘Serbian national movement 1389’) – compare with the IRK and the same year being written on the front page of every issue. In the elaboration of their main goals, the SNP1389 put Kosovo at the very opening, claiming that it is of utter importance to

“free and unite all Serbian lands into one Serbian state (the meaning of ‘all Serbian states’ comprises: the whole territory of today’s Republic of Serbia with its provinces Kosovo and Metohija, as well as Vojvodina, the Republic of Montenegro, Republic of Srpska and the Bosnia and Herzegovina Federation, as well as the area of the occupied Republic of Srpska Krajina with its territorial enlargement, and the northern part of the Republic of Albania).”

This is known as the expansionist nationalist politics of “Great Serbia”, which has its roots in the nationalist-romanticist discourses of the 19th century, though drawing its ontology from the fourteenth century¹⁷. The poem from the IRK even states that “Dušan’s tzardom” needs to be “retaken”; as we have already mentioned, the area under the rule of tzar Dušan was the largest territorial expansion ever to have been acquired by a noble of any dynasty ruling medieval Serbia, which coincides with a large part of what the SNP1389 desires. These desires are, in essence, an echo of the organization formed in 1911, the infamous ‘Black Hand’ (original name “Unification or Death”, a group that defenestrated King Aleksandar and Queen Draga Obrenović on 29 May 1903 in a coup), whose

“aim was to push for Serbia actively to take on the role of Piedmont in the unification of all south Slavs. They listed as ‘Serb provinces’ Bosnia-Herzegovina, Montenegro, Old Serbia (in the Kosovo area), Macedonia, Croatia,

¹⁶ Trgovcevic. *The Kosovo Myth in the First World War...*

¹⁷ Nenad Zakošek. „Democratization, state-building and war: The cases of Serbia and Croatia.“ *Democratisation* no. 15 (3) (2008): 588-610; Vladimir Žerjavić. „Great Serbia: tragic outcome,“ *Globus* no. 9 (1998); Bette Denich. „Dismembering Yugoslavia: nationalist ideologies and the symbolic revival of genocide.“ *American Ethnologist* no. 21 (2) (1994): 367-390.

Slavonia, Vojvodina and the littoral. Their lobbying and their support of armed bands operating in Ottoman territory increased with the prestige of the army after the Balkan wars”¹⁸.

In essence, what was an ideology of a *coup d'état* a decade before during the Obrenović dynasty, became public policy under the Karađorđević dynasty.

Much of such discourse involves a somewhat inexact vision of the past. In Dikjink's words,

“where nationalist sentiments prevail, the past is always important. It is the main source of arguments and frustration, however, distorted and mythologised ... The person who experiences five centuries of Turkish suppression as a gap in national history rapidly ends up in medieval Great Serbia On Kosovo Day (28 June), the Serbs traditionally commemorate the fall of the Serbian empire at the Battle of Kosovo in 1389 and the start of centuries of Turkish rule”¹⁹.

As Kritikos wrote, “each of the Balkan nationalisms appropriated and focused selectively on glorified moments of their remote past, in order to achieve national assertion and to bind up their people with folk traditions”²⁰; Serbia was not an exception, and the print media from 1912 exploited this fact heavily.

Even if we go much further back into history, to be noted, the obsession with Kosovo will still be found: “I woke up early, but I did not want to go downtown. The first thing I thought about was that today is St. Vitus Day. In my thoughts, I was more in Kosovo than in my room. It made me sad. I could do almost nothing”. As Mišković elaborated, the lines above “were written around 1850 by a young Serb during his studies at a Western university ... In his fantasies, he was transported back to the fourteenth century and took part in the famous battle of Kosovo on St. Vitus Day, 28 June 1389”²¹. His name was Jevrem Grujić, later becoming a high-ranking politician in Serbia. The obsession with Kosovo was much older than either the early 21st or early 20th century, and as such, it served as a convenient discursive moment for the mobilization of feelings of aggression and staunch nationalism. The Serbian “struggle for independence was linked to the idea of revenge for Kosovo and had a strong religious

¹⁸ Stevan K Pavlovič. *A history of the Balkans: 1804-1945* (Longman, 1999).

¹⁹ Gertan Dikjink. *National Identity and Geopolitical Visions: Maps of Pride and Pain* (London: Routledge, 1996).

²⁰ George Kritikos. „The geography of nationalisms and human security in the pre-Communist Balkan space“ *Southeast European and Black Sea Studies* no. 11 (4) (2011): 385-401.

²¹ Nataša Mišković. *Mission, Power, and Violence: Serbia's National Turn* (Belgrad: IB Tauris, 2011).



undercurrent²². All these instances are easily identifiable in both the discourse of the IRK and the SNP1389. Even after the two Balkan wars – in which Serbia is considered to have been on the winning side – similar sentiments were plentiful. Emmert wrote about the look backwards of a Serbian soldier right after the Balkan wars:

“The single sound of that word – Kosovo – caused indescribable excitement. This one word pointed to the black past – five centuries. ... My God, what awaited us! To see a liberated Kosovo. ... The spirits of Lazar, Milos, and all the Kosovo martyrs gaze upon us. We feel strong and proud, for we are the generation which will realize the centuries-old dream of the nation”²³.

Serbia is, one has to mention, far from being alone in the construction and (ab)use of such historical mythology; similar instances of historical battles (defeats, to be more precise) being hyperbolized in historiography are found in other parts of Europe as well, from the Hungarian Battle of Mohacs (1526), via the Battle of White Mountain for the Czechs (1620) to the divisions of Poland in 1772, 1793 and 1795²⁴. However, as Todorova noticed, “except for the Battle of Kosovo in Serbia, none of these defeats is a part of the national celebratory ritual”²⁵.

In 2015, one of the most active and popular nationalist organizations in Serbia (even entering the Parliament after having created a coalition with the nationalist-oriented Democratic Party of Serbia) are the *Dveri srpske* (Ser-Cro. “Serbian gateways”). Groups such as the *Dveri* movement (or the SNP1389) have not been studied often²⁶, due to the difficulties in evaluating and quantifying their political impact²⁷. However, due to the developed pregnant nationalism present in Serbia, it is becoming more important to assess their discourse, as well as to compare it with the 1912 discourse given above.

More often than not, the *Dveri* concentrated on the trope of Kosovo. Due to the constant attempts of appealing to the younger population, the *Dveri* most commonly use the internet as their favoured media. In their section entitled “The Foundations of Our Politics”, Kosovo figures as one of the most important issues. Just one example is their publishing of the known anti-Semite and

²² Mišković. *Mission, Power, and Violence...*

²³ Thomas A Emmert. *Serbian Golgotha-Kosovo, 1389* (East European Monographs, 1990).

²⁴ Maria Todorova and Slobodanka Glišić. *Dizanje prošlosti u vazduh: ogledi o Balkanu i Istočnoj Evropi* (Belgrade: Biblioteka XX vek, 2010).

²⁵ Todorova, Glišić. *Dizanje prošlosti u vazduh...*

²⁶ Barbara Wiesinger. „The Continuing Presence of the Extreme Right in Post-Milošević Serbia.“ *Balkanologie. Revue d'études pluridisciplinaires* no. 11 (1-2) (2008).

²⁷ Roger Eatwell. *Ten theories of the extreme right* (2003).

NSDAP-collaborator, the *vladika* Nikolaj Velimirović, and his text about Kosovo and what he dubs “the Knights of Kosovo”: “Would it not be useful for us to put ourselves forth to judgment under the court of the Knights of Kosovo?”²⁸. Many texts in which what is dubbed “the defense of Kosovo” figures prominently are often published, yet the alleged “defense” entails almost exclusively and always nothing more than protests about the recognition of present-day Kosovo as a standalone state, and, more recently, against the recognition of Kosovo by UNESCO²⁹.

Other institutions and individuals on the right side of the political spectrum are also rather energetic and prolific when it comes to “defending” Kosovo. The Foundation for Strategic Culture (*Ser-Cro. Fond strateške kulture*), for instance, published an elongated expose on Kosovo by Aleksandar Pavić (also carried over by the *Dveri* on their official webpage):

“However, Kosovo, no matter how much our internal and external enemies tried to diminish it, is not a simple material fact, a common interest, a common part of the territory. If it were so, the collective spirit of the nation, even in this inglorious moment in history, would not prevent even the “most pragmatic” of the political class ... to try to support openly its independence and acknowledgement as a separate state. (...) Kosovo keeps us collectively, obviously, in spiritual life, it reminds us of higher spheres of being...”³⁰.

Having in mind that Serbia was on the winning side of both Balkan wars, and having in mind that it did succeed in acquiring Kosovo in the First Balkan war (dubbed even then as “freeing” it), the only relevant difference between the discourses of 1912 and 2015 is about from whom Kosovo should be “freed” – once from the Ottoman Empire, now it had to be freed from itself. An important spin was added today, being that Kosovo made a self-declaration of independence, making it difficult for it to be “freed” from itself, so the contemporary nationalist core often sees Kosovo as “under occupation” by “foreign elements”, from the Albanians, via simply by a very undefined “West”, to the USA.

²⁸ Dveri. Vidovdan. Beseda vladike Nikolaja 2015c [cited 3 March 2015. Available from <http://www.dverisrpske.com/sr/program/temelji-nase-politike/2634-vidovdan-beseda-vladike-nikolaja.html>.

²⁹ Dveri. Potpisi za sprečavanje prijema Kosova u UNESCO 2015b [cited 5 March 2015. Available from <http://dverisrpske.com/sr/prenosimo/7251-potpisi-za-sprecavanje-prijema-kosova-u-unesco.html>.

³⁰ Aleksandar Pavić, Vladimir Kostić i Kosovo: veština naspram vrline. (Fond strateške kulture, 2015) <http://www.fksrb.ru/fond-strateske-kulture/ostalo/vladimir-kostic-i-kosovo-vestina-naspram-vrline/>.



Orientalism and suffering

The same issue of the IRK boasted the title “War for freedom and civilization” on its title page:

“We are writing a chronicle of the war for freedom and civilization in the European part of Turkey.

We are writing a chronicle of great events in the Balkans.

We are writing a chronicle of a great tragedy, of blood and death.

We are writing a chronicle of the suffering of those who die, and those who live.

We are writing a chronicle of the great hopes of those who give their lives for hope.

We are writing a chronicle of those who do not die, but suffer greatly.”

The very title suggests a somewhat orientalist discourse, in which the “Other” from the East is represented sub-textually as “uncivilized”: note that the Ottomans are not a single time directly called “uncivilized”, but the battle against them is dubbed to be a “battle for civilization”. As Ignjatović wrote, there is a “widely-shared image of the Turks as ‘uncivilized and barbarous’”³¹. Todorova has noticed that, in addition to a “balkanist” discourse presented by the Occident, there is a staunch balkanism present even in the Balkans, where the “Other” is taken from the Balkans themselves. She calls it “a process of ‘chain orientalisering of the Other’ in the Balkans, a sordid custom of the representation of the neighbour as ‘more oriental’ than us”, which is “characteristic for the broader situation of the spirit I have dubbed ‘balkanism’”³². The anaphoric construction with the repetition of “We are writing a chronicle” strengthens the importance of the piece and of the daily itself by giving it an artistic air, while the victimization of the self can be seen in the pictures of “blood”, “death”, “tragedy” and “suffering” (“our” blood, “our” death etc). The lengthy article continues:

“The peoples in Turkey, the Serbs, have no life in Turkey. It is the life they need. It is the life they long for. A full life, true, free, cultural and civilizational. There is no such life in Turkey. Turkey oppresses a great part of the lands of Europe, a great number of European peoples, many Serbs, young and wanting of life, freedom and work. It oppresses, suffocates, puts back and deforms a race that is new, original, young and full of life. Death becomes the source of life. The energy and will of the new race shall win, today or tomorrow.”

³¹ Aleksandar Ignjatović. „Images of the Nation Foreseen: Ivan Meštrović’s Vidovdan Temple and Primordial Yugoslavism,” *Review of Images of Imperial Legacy: Modern Discourses on the Social and Cultural Impact of Ottoman and Habsburg Rule in Southeastern Europe*, Eds. T. Sindbaek and M. Hartmuth, *The Slavonic and East European Review* no. 90 (3) (2012):527-530. doi: 10.5699/slaveastorev2.90.3.0527.

³² Todorova, Glišić, *Dizanje prošlosti u vazduh...*

What we see in the paragraphs above is described by Sundhaussen as the “myth of the golden pre-Osmanic era, of a clear and organic nation, of national rebirth, of the myth of Kosovo, of the *hajduks*, and the myth of suffering”³³. It should be noticed here that, as Todorova elaborated,

“it is very difficult to make a structural difference between such myths and the ‘golden age’ myth of antiquity, the myth (and practice) tied to the Nuremberg laws of the thirties and the *ius sanguinis*, the myth of Rome (as is seen in Italian national ideology, together with the myth of the Roman Republic, Roman Empire, as well as the myth of the Papacy, the myth of the Battle of Poitiers (both the one in the eighth and the one in the fourteenth century), the myth of the Valkyries and the myth of the fortress under the siege of enemies”³⁴.

It would be wise to note that the orientalisising discourse was far from being present only in Serbia, or among the peoples of the Balkans who rose against the Ottoman Empire. Svetozar Tonjoroff, in a 1912 article published by the *North American Review*, wrote how “these minor peoples [were] tugging at the leash in their desire to fly at the throat of their old oppressor”, mentioning even “the hazards of Ottoman rule [of] the Christian populations of Macedonia and Thrace”³⁵.

Going back to the source material, we can turn to yet another issue of the *Illustrated War Chronicle*, this time from 25 October 1912, in which discourse of the same type can be seen, concentrating on the “Turkish yoke” and the years of “suffering” for the Serbian “nation”, as well as of the ubiquitous “vengeance for Kosovo” as a point of mobilization:

“There has been suffering for five centuries. There has been torture for five hundred years. It had been a sea of suffering. The whole nation lived in agony. The Serbian nation. Turks tortured it, for the Serbian nation slaved under the Turks. Even those who were out of the reach of the Turkish government suffered. We all know it because we suffered. For whilst we were still suckling on the mother’s breast, they sang to us songs of Kosovo and slavery. Then we were told stories about slavery and suffering. When we learned to read, we read folk poetry, we read them to ourselves and others, and the feelings of suffering and longing for vengeance crept into our soul. All our national soul filled with bile. A sea of bile was spilled over our people. In addition to that, many others oppressed us, and we rolled about under the weight of mighty

³³ Holm Sundhaussen. 1999. *Europa balcanica. Der Balkan als historischer Raum Europas. Geschichte und Gesellschaft* no. 25 (H. 4): 626-653 (1999).

³⁴ Todorova, Glišić, *Dizanje prošlosti u vazduh...*

³⁵ Svetozar Tonjoroff. „The War in the Balkans.“ *The North American Review* no. 196 (685) (1912): 721-730.



and hard blows. We were the anvil on which heavy and too heavy strikes pounded. The anvil was mighty and hard, and as the blows became stronger, it became even harder. Our suffering made us stronger. We became a strong nation, toughened up, ready for life and strife. Ready for the vengeance over Kosovo. And then our time came. Our time is today.”

In the passages above, we see metaphors galore; once again, not confined to the discourses of the Balkans. The repetition of instances with negative connotations, such as “slavery”, “suffering”, “longing for vengeance”, emphasizes the victim mentality that is supposed to support and sustain the warmongering climate of the age. The aforementioned article by Tonjoroff wrote, among other issues, how “the telegraph-wires flashed to the breakfast-tables of chancellors and permanent under-secretaries the astonishing news that the forked lightning was already riving the thunder-clouds that had hovered over southeastern Europe since the father of the oldest statesman of them all was in swaddling-clothes”³⁶. There is talk about the “national soul filled with bile”, as well as a vivid metaphor of the “anvil”, striking down on the victim, Serbia, that often gets personified as a discursive strategy by which it gets easier to promote “defense”, where in reality, an attack is about to take place.

The ‘five hundred years under the Turkish yoke’ is called one of the “shabbiest general moments of nationalist discourse” in Serbia by some authors³⁷, as well as “the mythical aura of the Turkish yoke”³⁸, which was used even in the official language of scholarly publications in the aftermath of the Balkan wars („Belgrade itself fell once more under the Turkish yoke“)³⁹. It is almost omnipresent in today’s banal nationalist discourse, so statements such as “small wonder, since we have been under the Turks for 500 years”⁴⁰ in a student’s impression, or “is it a genetic remain due to the 500 years of life under the Turks”⁴¹ in the view of a popular security analyst Miroslav Lazanski are easy to find. The banality of such a way of thinking is seen in the context, for none of the two abovementioned texts directly propound Serbian nationalism – the five centu-

³⁶ Tonjoroff. „The War in the Balkans“ ...

³⁷ Dejan Ilić. „Beg iz ropstva“, Peščanik (2014), <http://pescanik.net/beg-iz-ropstva/>.

³⁸ Aleksandar Ignjatović. „Images of the Nation Foreseen: Ivan Meštrović’s Vidovdan Temple and Primordial Yugoslavism.“

³⁹ Vasa Stajić. „Svetozar Miletić and the Liberal Idea among the Yugoslavs.“ *The Slavonic Review* no. 5 (13): 106-113 (1926).

⁴⁰ Bojan Arambašić. „Istanbul prekretnica života – priča studenta sa prakse“, IAESTEBIH 2015 [cited 17 March 2017. Available from <http://iaeste.ba/istanbul-prekretnica-zivota-prica-studenta-sa-prakse/>.

⁴¹ Dveri. 15 March 2015. Doktrina ministra Gašića 2015a [15 March 2015]. Available from <http://www.dverisrpske.com/sr/prenosimo/6514-doktrina-ministra-gasica.html>.

ries under the Turks is simply a given. Putting the phrase into a broader context, the trope of the “Turkish yoke” was and is to be found in many other countries, from Romania to Armenia⁴² or Bulgaria⁴³.

The daily *Politika*, on 18 September 1912, published “A response to Turkey” on its front page in which it claims that “in Turkey ... things that are impossible at the basic level of human culture happen daily”. The text called for the protection of the “Christian population”, in an *antemurale* pathos often used against Islam. According to this text, Serbia has “cultivated the relations of the most correct of neighbors” with the Ottoman Empire, yet now “the Serbian government was forced to mobilize”, showing what van Dijk calls *captatio benevolentiae*⁴⁴, by which We are “good”, and the “enemy” is “bad”. Neither the *Ilustrovaná Ratna Kronika*, nor the *Srpski Glasnik*, nor *Politika*, however, explained or elaborated on this “horrible” treatment of the “Serbian” or “Christian” population. Statements such as those above were exclusively given in a declarative discursive manner, without details of any kind. Another revealing declarative paragraph can be found in the IRK from October 18, 1912, entitled ‘An introduction to war’:

“Why: a war against the Turks? Because: Turkey in Europe is a state of anarchy, a medieval state, Asian. In it, there is utter lawlessness. Freedom, personal and property is not protected. There are no laws or justice. The designations of this state are robbery, abductions and murder. It is a shame that such a state exists in Europe in the twentieth century. Turkey oppresses large areas, and there are many peoples in it. There is only up to a million Serbs. These peoples, these Serbs, lived in slavery. And the land in Turkey lived in slavery. The land was dead capital. Turkey was unproductive. The time was a night to make of it a European state. It (Turkey) could not do it on its own. It gave a great generation. Those were the Young Turks. They wanted to make a European state out of Turkey; they wanted it, but they could not succeed. They were energetic, they were patriots, but there was nothing to be done with Turkey.”

The declarative, uncorroborated nature of the text is all-permeating. From anarchy and Ottoman “medievalness” via lawlessness to abduction and murder, all these instances are simply proclaimed, declared, put forth, without a shred of actual evidence to corroborate the claims. The addition of the Young Turk movement served to strengthen the “backwardness” of the Ottoman Empire, showing that it could not reform itself even from within.

⁴² Raymond E Crist, „Cross Cultural Currents in the Near East,” *American Journal of Economics and Sociology* no. 50 (2) (1991): 255-256.

⁴³ Ralph Warburton. „THE WORLD’S NERVE CENTRES.” *The Journal of Education* no. 68 (14 (1699)) (1908):399-400.

⁴⁴ T. A van Dijk. „Discourse and Manipulation.” *Discourse & Society* no. 17 (3) (2006): 359-383.



Contextualizing the mentioned historical events, we see that the time was fruitful for military action against an already decaying Ottoman Empire, especially having in mind the unrests in Albania and the Ottoman military action in Libya. As Pavlowitch wrote, “the Ottoman army had been weakened by the war in Libya, by domestic controversies, by financial problems and by desertions. Its forces in Europe were outnumbered by those of the Balkan allies”⁴⁵. If ever there was a time to strike, it was in 1912, and the government of the Monarchy of Serbia seemed to have understood this more than well. After an extended border dispute with the Empire, Montenegro was the first to declare war in October 1912, followed by Serbia, and then by Greece and Bulgaria. The discourse propounded by the government via the media had to justify military action against a politically accepted sovereign state, and thus a strong warmongering pathos emerged in the media as a means to that end.

The Call to War

His Royal Majesty, King Petar I, proclaimed war against the Ottoman Empire in November 1912. This announcement was jubilantly reproduced in the IRK on 8 November. It represents a combination of the instances presented and analyzed above, as we see an amalgamation of the Kosovo trope, the Great Serbia, the victim mentality – all in one text. When the elites themselves enter a warmongering, nationalist discourse, it is of small wonder to see it flourish so successfully.

“A Call to War By His Majesty, the King of Serbia, Petar I, to the Serbian people: Newest events put forth the salvation of the fate of the Balkan peninsula, and with it, the fate of Old Serbia, that celebrated but sad mother of our kingdom, where the historical core of the Serbian state of the kings and tzars of old lies, where the famed capitols of the Nemanjićs are: Ras in Novi Pazar, Priština, Skoplje, Prizren; where our brothers live, our brothers by: blood, language, customs, mentality, wishes and cravings. The conquering and bigoted ottoman rule has been exterminating these brothers of ours for centuries. From the Berlin Congress to this day and age, killing, abduction to Asia, and until the very last days, forced movement, conversion of males and females into Turks, unacknowledging our faith and language, the Serb name, were the foundation of Turkish governance. ... Even the very rules of customs in Turkey have unreasonably prohibited trade ...”

What is also of notice is the gendered, feminized vision of “mother Serbia”, a trope often used in nationalist discourse⁴⁶, emphasizing the vulnerability of

⁴⁵ Stevan K Pavlovič. *A history of the Balkans 1804-1945* (Longman, 1999).

⁴⁶ Amena Mohsin, „Gendered nation, gendered peace.” *Indian Journal of Gender Studies* no. 11 (1) (2004): 43-64; Tamar Mayer. *Gender ironies of nationalism: Sexing the nation* (Routledge,

femininity in a patriarchal *Weltanschauung*, stressing, thus, the need to ‘defend’ it. Additionally, history is put into the spotlight as well by enumerating important medieval cities of the old Nemanjić dynasty.

The *Srpske Novine* (Ser-Cro. “Serbian newspaper”), the official gazette of the Monarchy at that time, printed the sermon given by King Petar on 20 September 1912, in which the sovereign expounded on the reasons behind the war against the Ottoman Empire. Several instances were mentioned, among others “the position of our compatriots in the Ottoman Empire”, which has “always been a cause of worries in the Kingdom of Serbia”. Note that the idea of “suffering” of the “Orthodox Serbs” under the “yoke of the Turks” does not have a confirmation within contemporary historiography. What is more, even when the Ottoman Empire slowly took over parts of the Balkans from the fourteenth century onwards, historians have noticed that to the contrary, some of the serfs and significant parts of the population felt relieved, having in mind that they used to pay heavier taxes under their former rulers⁴⁷. King Petar used an appeal to emotion in his sermon often, claiming, among other issues, that “we were forced to conquer the strongest, simplest emotions of the whole nation in relation to the “increasingly stronger cries of our downtrodden brothers, who face ultimate extinction”. A week later, the *Srpske Novine* published a reply to the sermon, written by the People’s Parliament, in which the Parliament approved the decision to go to war, echoing the King’s sentiment: “the desperate condition of our compatriots in the Ottoman Empire has ever given heavy concerns both to the people and the governments of the Kingdom of Serbia”. Note the populist instance in which the sentiment of the people is equalled to that of the government.

Today, nationalist and xenophobic web portals in Serbia still see Turkey in the same vein. A revealing text published by InterMagazin claimed the following in 2016:

“Dear Turks! I am fond of you because we broke free from you, and because several states and borders with people such as us separate us from you, people who have, like us, Serbs, been your slaves. For 500 years. ... we have churches and monasteries from the time when we were your slaves ...”⁴⁸.

The more extremely oriented Stormfront see their members post numerous forum threads “exposing” Turkey as a century-old enemy of Serbia, among

2012); Kif Augustine-Adams. „Gendered States: A Comparative Construction of Citizenship and Nation,” *Va. J. Int’l L.* no. 41:93 (2000).

⁴⁷ Holm Sundhaussen. *Europa balcanica. Der Balkan als historischer Raum Europas. Geschichte und Gesellschaft.* (1999); 25: 626-53.

⁴⁸ R Andrić. „PISMO TURCIMA: Daleko vam lepa kuća! Mi Srbi, dobro znamo ko ste vi! Neka vas neko drugi miri sa Rusima!” InterMagazin: (2016, accessed 16 February 2017).



other issues, writing how “Turks and Jews were together against Serbia”⁴⁹. The social media active nationalist portal *Srbin.info*, for instance, wrote about the child levy, the so-called *devsirm*⁵⁰, trying to present it as if the *devsirme* was localized to Serbia. The *Nova srpska politička misao* portal, one of the strongest points of Serbia’s contemporary Right Wing, published Milanko Šekler’s own view of the Turkish rule, entitled “The child levy, now and then”.

The daily *Politika*, known to have been loyal to any government for over a century now (as it still exists), published a text with the title “Mobilization” on 18 September 1913. According to this text, “Serbia has been put into a hard and fateful situation” as the mobilization against the Ottoman Empire was a “necessity”, adding that “Turkey got what it deserved”. Turkey will be fought against by “one of the best armies in the world”, which is how the IRK (9 May 1913) described the Serbian army.

Conclusion

Kritikos summed up the nationalist *topos* of the glorified past succinctly, saying that

“the cultural formulations from a remote glorified past and the emotional appeal of nationalist mobilization, the association with a specific ‘homeland’, the myth of common descent, and the ‘continuity’ between an ethnic past and a national present became intrinsic to the Balkan identification as well as to the creation of some of the main attributes of ethnic community”⁵¹.

This continuity is all-permeating and ubiquitous, linking the warmongering print media discourse from 1912 with the same pathos which is being used at the beginning of the 21st century. The (mis)use of history is a crucial, intrinsic element in the discursive mobilization of support by nationalist groups, politicians and individuals. The more primary material we find from the past, the better shall our understanding of the present become. This is why Patrick Geary stressed that the prime area of interest for historians should be the countering of a twisted version of the past⁵², something that can be achieved with rigorous analysis of the past, via the use of an almost endless corpus of primary material.

⁴⁹ Stormfront.org. Turci i Jevreji, zajedno protiv Srba. 2007.

⁵⁰ *Srbin.info*. Danak u krvi: kako su Turci vladali Srbima. *Srbininfo*.

⁵¹ George Kritikos. „The geography of nationalisms and human security in the pre-Communist Balkan space.“ *Southeast European and Black Sea Studies* no. 11 (4) (2011): 385-401. doi: 10.1080/14683857.2011.632541.

⁵² Patrick Geary. *The myth of nations: the medieval origins of Europe* (Princeton University Press, 2002).

The same can be said about the media from the beginning of the 20th century in Serbia, as much as about the media from the 21st century. Encomiast discourse about the Self, ignoring or satanizing about the Other. The most productive pressure point is seen in the case of Kosovo, which was a central point of nationalist discourse during the Balkan wars as much as it has become the same anew from the 1990s, carrying on into the 21st century. What we see here is a century on concentrating on a mythical sociopolitical instance. It is mythical as it is not based in historical reality, and, for lack of other words, dangerous and detrimental, as the country has had much issues in moving forward with the EU accession absent an agreed border. Without knowing whether Kosovo is a part of Serbia or not, the country is finding it rather difficult to go forward, and political players keep using the issue to evade other, more pressing issues, such as the current attacks on the free media and the diminishing freedom of speech and the press, galloping poverty, corruption, crime, and a plethora of other, detrimental issues that are nowadays framing Serbia as a captured state under the government of Aleksandar Vučić.

Rezumat

Acest articol explorează presa scrisă din 1912 din Serbia privind războaiele din Balcani, comparând discursul naționalist cu epoca contemporană. În acest studiu sunt analizate conținutul mai multor articole tipărite în lucrări precum *Cronica de război ilustrată* (*Ilustrovana ratna kronika*) și ziarul sârbesc (*Srpske novine*), juxtapunând discursul lor cu naționalismul sârb contemporan. Studiul arată că după un secol de la trecerea războaielor balcanice, discursul naționalist a rămas mai mult decât similar, folosind același discurs istoric al victimizării și al „alterării” inamicului.

Cuvinte cheie: *Cronica de război ilustrată*, *Srpske novine*, politica, Serbia, naționalism.

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Școala română din Paris (Fontenay-aux-roses) – file semnificative din istoria unei instituții românești dispărută în negura timpului

Vasile-George URSU

Abstract

The beginning of the twentieth century was strongly marked by the First World War. Among the unexpected results of this conflagration we can observe an exponential growth of cultural relations between the states involved in the conflict on the same side. If we explicitly look at the Romanian-French cultural relations from this perspective, it becomes obvious that we are dealing with an exceptional example of cultural collaboration on the European continent. The first concrete step of this process was the signing in Bucharest of The Poincaré-Angelescu Educational Convention on June 15, 1919, a document according to which the French state provided its support for the consolidation of Romanian education, especially in the new provinces that entered the Romanian state. Thus, in Bucharest, the French university mission was created as a separate entity as a result of this convention. Later, in 1924, it was reorganized into the French Institute of Higher Studies. Through these two concrete actions, the French state took the initiative and offered its promised support for its "Latin sister in Eastern Europe". In the same period, the actions of the Kingdom of Romania in this sense were much slower and more indecisive, requiring a private initiative of the historian N. Iorga. This initiative led to discussions held in Bucharest concerning the establishment of two Romanian Schools in France and Italy. In the case of the Romanian School in France, the historian N. Iorga took care of all the organizational efforts aimed at establishing this institution, e.g.: choosing a building in the picturesque suburb of Paris – Fontenay-aux-Roses, which he bought on behalf of the Romanian state, proposing a special law for creating these schools in the Romanian Parliament, lobbying and negotiating in the French political milieu, seeking all the available ways to make sure the project was fulfilled, and supervising the entire educational process for the rest of his life. The official inauguration of the Romanian School in Fontenay-aux-Roses took place on June 1, 1922. Since then, this locality and the school had become the most important places for Romanian students in France. The functioning of the school facilitated the access of Romanian doctoral students in the humanities to the resources indispensable for study and research, while most of the Romanian historians with important works written during the interwar period benefited from scholarships there. The establishment of the communist regime destroyed this institution dedicated to Romanian education, first by closing its gates and then by selling the whole establishment. After the sale, in the years to come, the buildings of the institution were demolished. Instead, modern facilities were constructed. Thus, the spirit of the Romanian School in

France disappeared. In 1997, a proposal was put forward to revive this interwar project in the Romanian Parliament. However, this proposal was rejected due to the negative opinion of the specialized parliamentary commissions. After this event, the possibility was never discussed again.

Key-words: Romanian School in France, Nicolae Iorga, Fontenay-aux-Roses, Romanian Culture, Research Scholarships.

Legăturile culturale dintre Franța și România, în perioada interbelică, au cunoscut un continuu trend ascendent, iar istoricul N. Iorga (1871-1940), unul dintre intelectualii români apropiați de inteligența franceză, alături de care se formase, a reprezentat un filon invariabil și de primă importanță al acestui proces. Finalul Primului Război Mondial oferea continentului european împrejurări speciale pentru reclădirea legăturilor culturale internaționale. În acest context, istoricii V. Pârvan (1882-1927) și N. Iorga au considerat oportun și necesar să construiască, la Roma și Paris, două instituții academice, denumite „școli”. Obstacolele ivite până la funcționarea efectivă a celor două instituții au fost multiple și procesul a fost anevoios. Cele două instituții aveau ca principală atribuție adăpostirea și îndrumarea tinerilor români meritoși, ce absolviseră studiile de licență („de diplomă”, după denumirea epocii) în România și care căutau institute de cercetare în care să se specializeze în domeniile doctorale din spectrul științelor umaniste¹. Tezele pregătite în urma acestor stagii bursiere urmau să fie susținute în România, iar în acest mod, în mediul celor două școli, au fost pregătite multe dintre studiile istorico-umaniste de primă importanță ale perioadei interbelice. Istoria celor două instituții și organizarea internă au reprezentat problematici de cercetare istoriografică pentru câțiva istorici recunoscuți în istoriografia ro-



Fotografia nr. I – Istoricul N. Iorga (1871-1940) unul dintre prietenii cei mai apropiați ai geografului francez E. de Martonne.

Sursă: „Cele Trei Crișuri – Anale Culturale”, Anul XVII, nr. 1-2 - ianuarie-februarie 1936, Editura „Scrisul Românesc” din Craiova, Oradea, 1936, p. 23.

¹ L. Nastasă, *Itinerarii spre lumea savantă. Tineri din spațiul românesc la studii în străinătate (1864-1944)* (Cluj-Napoca: Editura Limes, 2006): 208.



mânească, respectiv: P. Țurlea², L. Nastasă-Kovacs³, Veronica și Șerban Turcuș⁴ sau pentru istoricul francez Jean-Yves Conrad⁵. În ciuda acestor realizări de primă importanță pentru istoria celor două instituții, momentele inaugurărilor și contextul în care se ajunge la aceste rezultate au beneficiat de spații limitate, cercetările axându-se în special pe aspectele ce țin de specificul schimburilor cultural-educaționale. Pentru Școala Română din Franța, dispărută între timp sub lăma buldozerelor și asupra căreia ne vom axa în cadrul prezentului articol, anumite aspecte specifice ce țin de mediul intern vor rămâne o enigmă. De asemenea, modul în care instituția a fost creată și a funcționat până la instaurarea definitivă a molimei comuniste reprezintă – și va reprezenta – un punct de interes pentru istoriografia românească. Memoriile și considerațiile creatorului acestei instituții, istoricul N. Iorga, reprezintă, de asemenea, o sursă de informație de primă importanță, ce trebuie analizată luând în calcul subiectivismul specific scrierilor memorialistice.

Așa cum menționam anterior, finalul Primului Război Mondial a facilitat reorganizarea legăturilor culturale dintre statele implicate sau neimplicate în conflict, motivele din subsidiarul acestui proces fiind reprezentate de evitarea unor noi conflicte de această amploare și consolidarea pozițiilor geostrategice prin utilizarea diplomației culturale. Urmărind exclusiv filonul româno-francez al acestor demersuri, constatăm un context internațional româno-francez și franco-român mai mult decât favorabil. Astfel, la finalul anului 1917, la Paris sosea o delegație universitară românească ce a beneficiat de atenția mării majorități a intelectualilor și politicienilor francezi. Drept răspuns la această vizită, la aproape 2 ani de la vizita românească, în luna iunie 1919, la București a sosit o misiune universitară franceză ce a semnat, în data de 15 iunie, prin liderul delegației, profesorul L. Poincaré, Convenția „Poincaré-Angelescu”⁶ pentru sprijinirea învățământului românesc. Sprijinul acordat de statul francez pentru mediul educațional românesc, în baza acestei convenții, cuprindea și posibilitatea de construire a unor proiecte educaționale comune, astfel luând naștere proiectul Școlii Române din Franța. În aceeași perioadă,

² Petre Țurlea, *Scoala română din Franța* (București: Editura Academiei Române, 1994).

³ Nastasă, *Itinerarii spre lumea savantă ...*, 208.

⁴ Veronica Turcuș, Șerban Turcuș, *Între cultură, șantaj și spionaj. Accademia din Romania la crepuscul (1947-1955) - Studiu și documente* (Cluj-Napoca: Editura Școala Ardeleană, 2017).

⁵ Jean-Yves Conrad, „Nicolae Iorga și elevii Școlii Române din Paris, la Fontenay-aux-Roses”, *Biblioteca Bucureștilor*, Anul al VI-lea, (2003), I.

⁶ Convenția a fost semnată de șeful misiunii universitare franceze, fizicianul francez Lucien Poincaré (1862-1920) – frate președintelui francez Raymond Poincaré (1860-1934) și de profesorul dr. Constantin I. Angelescu (1869-1948), ministrul instrucțiunii publice și reformatorul învățământului românesc interbelic.

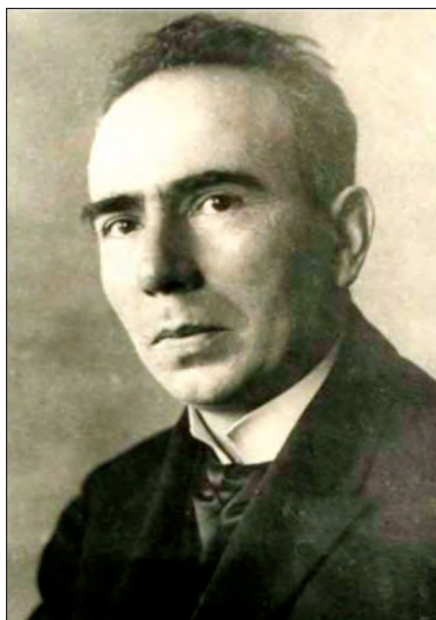
istoricul V. Pârvan a conceput un proiect similar pentru mediul academic româno-italian. După dezbaterile ideilor în cercurile intelectuale apropiate de cei doi istorici fondatori, cele două proiecte au câpătat nuanță legislativă, iar cele două școli au fost aprobate din punct de vedere legislativ printr-o lege specială votată de Parlamentul României, în luna august 1920. Legea ce a fost ulterior promulgată prin Decretul Regal nr. 4285 din 22 octombrie 1920⁷. Proiectul de inițiativă legislativă al celor două școli a fost realizat de parlamentarul N. Iorga, cele două instituții academice urmând să aibă secție de studii arheologice, secție de studii istorico-filologice și secție de arte frumoase⁸. Principalul deziderat al acestor „școli”, conform proiectului legislativ inițial, era reprezentat de contribuția „*la strângerea legăturilor cu lumea apuseană pe tărâm științific, iar pe de altă parte să extindă contactele cu viața socială și cultura Occidentului*”⁹. Spre deosebire de proiectul inițial, proiectul legislativ final al acestor școli prevedea, cu privire la organizarea internă, faptul că acestea vor avea alte secții în domenii complementare, precum:

I. Secție pentru studiile de istorie și filologie a popoarelor romanice;

II. Secție pentru continuarea studiilor universitare de specialitate la acele discipline care nu se predau în România;

III. Secție pentru cultivarea artelor¹⁰.

Stagiile de specializare aveau durata de un an existând totuși posibilitatea ca acestea să fie prelungite pentru doi ani, iar studenții beneficiari nu puteau fi decât cei recomandați de instituțiile naționale de învățământ superior¹¹.



Fotografia nr. II – Istoricul V. Pârvan (1882-1927).

Sursă: https://upload.wikimedia.org/Vasile_Parvan (accesat în data de 29 martie 2019)

⁷ Nastasă, *Itinerarii spre lumea savantă ...*, 208.

⁸ I. Traia, „Viața și activitatea eruditului cărturar bănățean Ioachim Miloia,” *Administrație românească arădeană Studii și comunicări din Banat – Crișana*, Doru Sinaci, Emil Arbonie(coord.), vol. al VI –lea (Arad: „Vasile Goldiș” University Press, 2013): 292.

⁹ Traia, „Viața și activitatea eruditului cărturar ...”, 292.

¹⁰ Nastasă, *Itinerarii spre lumea savantă ...*, 208.

¹¹ Nastasă, *Itinerarii spre lumea savantă ...*, 208.



Fotografia nr. III – Politicianul francez Léon Bérard, ministrul instrucțiunii publice în anul 1919 și în perioada 1921-1924.
Sursă: https://upload.wikimedia.org/Vasile_Parvan (accesat în data de 29 martie 2019)

Legea de înființare mai prevedea ca directorii acestor școli să fie numiți pe viață, sub pretextul prevenirii situațiilor în care aceste instituții ar putea să intre sub influența jocurilor politice, însă situația a devenit arbitrară, cel puțin în cazul Școlii Române din Franța, unde director al instituției a fost numit istoricul N. Iorga¹². În aceeași lege de înființare, cu privire la Școala Română din Roma, s-a stabilit ca director al acesteia să fie istoricul și arheologul V. Pârvan¹³, o personalitate recunoscută în științele umaniste la nivel internațional. În mod practic, în acest mod, fondatorii celor două instituții vegheau la buna desfășurare a proiectelor pentru care militase în anii anteriori. Această situație a creat nu-

meroase animozități, existând intelectuali români ce considerau cele două conduceri drept trecerea unor probleme educațional – statale în plan privat.

Aflat la Paris, la începutul anului 1921, istoricul român N. Iorga se va ocupa personal, alături de politicianul francez Léon Bérard (1876-1960) – ministrul francez al învățământului în această perioadă–, de demersurile de înființare al școlii românești. Grație acestor demersuri, în data de 18 ianuarie 1921 lua ființă din punct de vedere legislativ francez Școala Română din Paris, în pitorescul orășel Fontenay-aux-Roses¹⁴. După înființarea legislativă, intrarea efectivă în activitate a instituției românești va avea loc în perioada următoare, procesul fiind unul marcat de câteva vicisitudini birocratice și logistice. În toamna aceluiași an, istoricul român a susținut o conferință la Fontenay-aux-Roses¹⁵, acesta fiind primul act cultural românesc din localitate, însă pentru ca studenții români, cei pentru care fusese creată, să aibă acces la instituție va mai trece o perioadă

¹² Nastasă, *Itinerarii spre lumea savantă ...*, 208.

¹³ Traia, „Viața și activitatea eruditului cărturar ...”, 293.

¹⁴ N. Iorga, *Cugetări* (București: Editura Tineretului, 1972): 298.

¹⁵ A. Stănculescu-Bârda, *N. Iorga - Concepția istorică* (Craiova: Editura Sitech, 2011): 31; A. Stănculescu-Bârda, *Nicolae Iorga, așa cum l-au cunoscut - Amintiri inedite adunate și prezentate* (Bârda: Editura „Cuget Românesc”, 2012): 27.

de timp. Cu privire la aceste momente N. Iorga a publicat în revista „Cele Trei Crișuri – Revistă de Cultură” din luna iulie 1923 articolul intitulat „Școala Românească din Fontenay-aux-Roses”, în cadrul căruia a explicat cum s-a ajuns la această realizare meritorie pentru cultura românească:

„Printr’o lege votată în 1921, după propunerea mea, s’au înființat pentru strângerea relațiilor cu latinitatea apuseană două „școli” românești, pentru cercetări în arhive și biblioteci, precum și pentru contactul cu cultura și viața socială a Occidentului cu aceeași rasă cu noi, în Franța și în Italia”¹⁶.

Locul ales pentru așezarea acestei instituții a fost imobilul cu numărul 48 de pe strada Châtaigniers¹⁷ din localitatea Fontenay-aux-Roses, la aproximativ 5 km de Paris, într-un imobil achiziționat de N. Iorga în contul statului român¹⁸. Se pare că istoricul român a ales acest loc urmând sfatul prietenului său, istoricului Ferdinand Lot(1866-1952), ce locuia în același orașel, pe strada Boucicaud, la imobilul cu nr. 53¹⁹. „Ziarul ”Le Temps” din data de 3 iulie 1922 consemna evenimentul de inaugurare a Școlii Românești și amintea întreaga desfășurare a momentului festiv”. Conform publicației, scopul noii instituții academice era acela de:



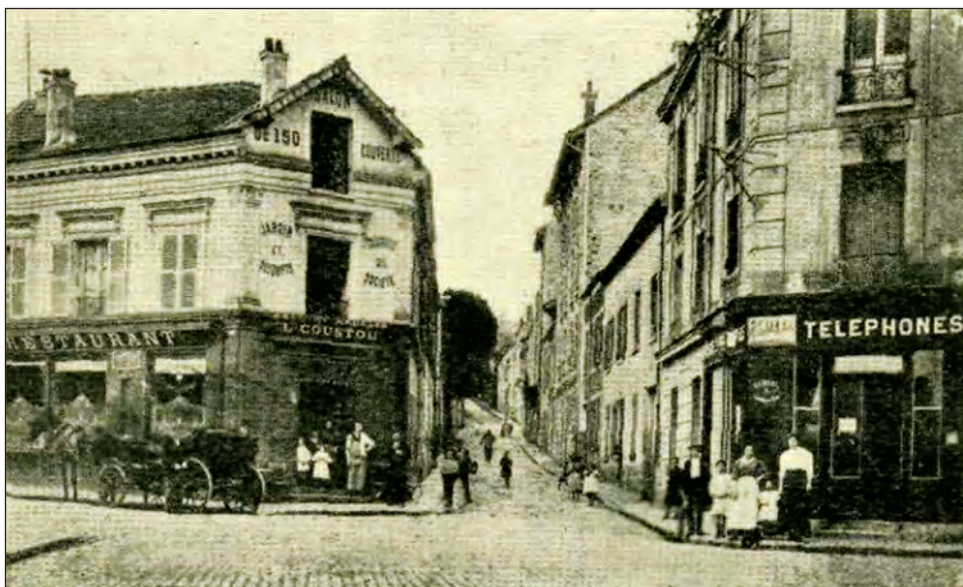
Fotografia nr. IV - Aripa Școlii în care locuiesc membrii.
Sursă: Ion Breazu, „Școala română din Paris”, Boabe de Grâu, anul I(1930), nr. 6: 332.

¹⁶ N. Iorga, „Școala Românească din Fontenay-aux-Roses” în *Cele Trei Crișuri – Revistă de Cultură*, anul al IV – lea (Nr. al VII – lea – iulie 1923): 103.

¹⁷ A se vedea: „La Croix pour le sous-directeur de l’École Roumaine? (1923)”. Accesat în data de 10 noiembrie 2018, https://www.fontenay-aux-roses.fr/fileadmin/fontenay/MEDIA/decouvrir_la_ville/histoire/Publications/Quinzaine/281-La_Croix_pour_le_sous-directeur_de_l_Ecole_Roumaine__1923_.pdf.

¹⁸ Nastasă, *Itinerarii spre lumea savantă ...*, 208; A se vedea, de asemenea: Stănculescu-Bârda, N. Iorga - *Concepția istorică ...*, 31; Stănculescu-Bârda, *Nicolae Iorga, așa cum l-au cunoscut ...*, 27.

¹⁹ „La Croix pour le sous-directeur de l’École Roumaine? (1923)”.



Fotografia nr. V - Fontenay-aux-Roses. Rue des Châtaigniers, strada în continuarea căreia se găsea Școala Română din Franța.

Sursă: Breazu, "Școala română din Paris", 333.

"...a consolida și dezvolta legăturile intelectuale existente între România și Franța și pentru a permite viitorilor maeștri ai învățământului superior din România să se angajeze în cercetări originale în instituțiile de înaltă cultură franceză..."²⁰.

De asemenea, aceeași publicație mai menționa faptul că Școala românească din Franța:

"...a fost creată(...) ca o imitație a școlilor franceze de la Roma și Atena, la inițiativa dr. N. Iorga, profesor la Universitatea din București..."²¹.

Analizând în profunzime semnificația locației alese de mentorul instituției, constatăm că aceasta a fost luată în calculul final²², în principal, pentru a evita tentațiile „ușoare” și „neintelectuale” ale Parisului²³. De asemenea, tot la propunerea acestuia, în cadrul școlii, se impuneau o serie de reguli riguroase în încercarea de a avea un control minim asupra tinerilor români sosiți pentru stagii academice. Dintre acestea pot fi menționate sumar următoarele reguli: servirea micului dejun și a cinei la sediul școlii, prezența obligatorie pe timpul nopții în

²⁰ "Le Temps", anul 62 (nr. 22.247 – 3 iulie 1922): 3.

²¹ "Le Temps", anul 62 (nr. 22.247 – 3 iulie 1922): 3.

²² Stănculescu-Bârda, N. Iorga - *Concepția istorică...*, 31; Stănculescu-Bârda, *Nicolae Iorga, așa cum l-au cunoscut...*, 27.

²³ Nastasă, *Itinerarii spre lumea savantă...*, 208.

dormitorul școlii, interdicția de a aduce musafiri în camere și interdicția de a locui împreună cu soțiile²⁴. Regulamentul de funcționare al celor două școli a fost publicat în „Monitorul Oficial al Regatului României” nr. 105 din 13 august 1921 și mai prevedea: „cele două instituții au caracterul unui „internat academic”, în care disciplina trebuia să fie foarte strictă. Școala din Franța acorda prioritate cercetărilor de arhivă și în biblioteci, cea din Roma se axa în principal pe arheologie. Fiecare din cele patru universități puteau recomanda câte doi membri pe an pentru fiecare Școală. Numărul de membri a fost fixat la 10 pentru fiecare din ele, în doar câteva cazuri urcând la 11-12”²⁵. Aceste reguli și restricții riguroase cât și distanța relativ mare până la bibliotecile și instituțiile de învățământ superior pariziene au generat numeroase nemulțumiri în rândul bursierilor. Dacă analizăm toate aceste aspecte, în contextul în care bursa acordată de statul român era relativ redusă din punct de vedere financiar pentru necesitățile și cheltuielile Parisului, constatăm că un număr însemnat de viitori universitari români au beneficiat de burse în cadrul instituției²⁶, în ciuda costurilor totale destul de ridicate ale unui astfel de stagiu. Explicațiile oferite de fondatorul instituției, cu privire la aspectele tratate anterior, la un an de funcționare efectivă a școlii și care au fost publicate în articolul „Școala Românească din Fontenay-aux-Roses” sunt relevante:

„Școala din Franța, a cărei conducere o am, n’a fost așezată în Paris chiar, ci pentru liniștea studiului în mica localitate, de o încântătoare poezie a naturii Fontenay-aux-Roses, care-și spune în nume chiar belșugul florilor. La o distanță foarte mică de capitală, cam o jumătate de ceas cu trenul sau cu tramvaiul până la Sorbona, membrii școlii au toate plăcerile aerului liber, ale mediului de frumusețe și sănătate.

Localul, care e proprietatea Statului român încă de la început, se compune dintr’un mare corp de clădire cu douăsprezece odăi în trei rânduri, din altul în față, cu aproape același număr de încăperi, dintr’un pavilion destinat Muzeului românesc, din două grădini și o destul de mare livadă. E așezat sus, lângă șoseaua care înconjoară fortificațiile și care duce, prin cea mai abundentă verdeață, într’o liniște ideală, deși la picioare e un întreg oraș, cu toate avantajele pe care le poate oferi”²⁷.

Școala Română din Franța venea complementar în procesul inexistenței unor instituții specifice care să se ocupe direct de aspectele academice dintre România și Franța și întreaga procesul început de misiunea universitară france-

²⁴ Nastasă, *Itinerarii spre lumea savantă ...*, 209.

²⁵ Nastasă, *Itinerarii spre lumea savantă ...*, 208, (nota 161).

²⁶ Nastasă, *Itinerarii spre lumea savantă ...*, 209.

²⁷ Iorga, „Școala Românească din Fontenay-aux-Roses ...”, 103.



Fotografia nr. VI – Domnișoara Maria Ventura(1888-1954) actriță și membră a Comedie-Française rostește un poem cu ocazia inaugurării Școlii Române din Fontenay-aux-Roses. Aceasta a mai fost cunoscută și sub numele complet de Aristida Maria Ventura, fiind născută la București, în data de 14 iulie 1888, având origini evreiești.

Sursă: *Le Petit Journal - Edition de Paris*, nr. 21.717 – 2 iulie 1922: 1.

ză în 1919. Inaugurarea a avut loc în data de 1 iulie 1922²⁸, după o pregătire anterioară și a fost marcată de fastul specific unui astfel de eveniment. Denumirea aleasă a fost **”École Roumaine en France”**, creatorul instituției oscilând între acest nume și cel de „Institutul Român din Franța”²⁹, iar cu privire la inaugurarea din data de 1 iulie 1922 N. Iorga consemna în memoriile sale:

”Inaugurarea, mult zăbovită, din cauza deszicerilor ministrului Bérard³⁰ (în războiu cu Universitatea), a Școlii noastre. Asistă Appell, care vorbește și căruia-i răspunde Antonescu (sunt silit să adaug câteva cuvinte despre valoarea politică a înființării școlii), Brunot, Diehl, de Martonne, Glotz, deputatul Lorin, profesorul Brunel. Mă bucură în deosebi venirea vechiului meu profesor Bémont, pe care l-am cercetat acum două zile în locuința-i înflorită de la Croissy-sur-Seine. Se recitează (d-ra Ventura emoționează adânc prin imnul d-nei de Noailles către Ile-de-France și comorile ei)”³¹.

²⁸ Nastasă, *Itinerarii spre lumea savantă ...*, 208.

²⁹ Pentru consultarea unui studiu avizat referitor la această problemă istorică, a se vedea: Petre Țurlea, *Scoala română din Franța* (București: Editura Academiei Române, 1994): 17.

³⁰ Istoricul român se referă la politicianul și diplomatul francez Léon Bérard (1876-1960).

³¹ N. Iorga, *Memorii*, vol. al III-lea – Tristețea și sfârșitul unei domnii, (București: Editura „Națională S. Ciornei”, 1939): 309.

Festivitățile din data de 1 iulie 1922, desfășurate sub îndrumarea directă a lui N. Iorga³², au beneficiat de prezența unui număr important de personalități ale mediului academic francez, amintite și în memoriile iorghiste, între care îi amintim pe profesorul Paul Appell (1855-1930) – rector al Universității din Paris, profesorul Ferdinand Brunot (1860-1938) – decan al Facultății de Litere, profesorul Charles Diehl (1859-1944) – specializat în istoria artei, profesorul Em. de Martonne (1873-1955) – geograf specializat în problemele geografice românești³³, profesorul G. Glotz (1862-1935), filologul Clovis Brunel (1884-1971), profesorul Ch. Bemont (1848-1939) și actrița cu origini românești Maria Ventura (1888-1954)³⁴. Din partea statului român au fost prezenți la eveniment, în calitate de reprezentanți oficial, ambasadorul Victor Antonescu (1871-1947), ministrul României la Paris în această perioadă³⁵ și unul dintre consilierii Legației Române din Franța. Înaintea momentului festiv, în data de 2 mai 1922, istoricul C. Marinescu (1891-1982) îi va trimite o scrisoare istoricului N. Iorga din localitatea Fontenay-aux-Roses, prezentându-i discuțiile avute cu profesorii Universității Sorbona cu privire la sosirea istoricului român la Paris pentru susținerea unei serii de conferințe. Conform scrisorii, profesorul M. Roques (1875-1961) a remarcat după această discuție că „*invitațiunea trimisă d(umnea) voastră echivalează cu un schimb de profesori între România și Franța d(omnul)l E. de Martonne făcând începutul*”³⁶. Așa cum precizam anterior, publicația „Le Temps”, în numărul din 3 iulie 1922, a realizat o descriere fidelă a desfășurării evenimentului. Astfel, conform corespondentului acestei publicații, rectorul Universității din Paris, profesorul P. Appell, a susținut un discurs în calitate de reprezentant al Ministerului Instrucției Publice. În cadrul cuvântării sale, rectorul parizian a făcut un adevărat elogiu acțiunii întreprinse de N. Iorga și a promis concursul direct al universității pe care o conducea pentru crearea noului Institut de Studii Franco-Române, ce va funcționa în cadrul Școlii Române din Franța, iar la aceste afirmații, asistența a răspuns cu un puternic ropot de

³² Dan Berindei, *România și Europa în perioadele premodernă și modernă* (București: Editura Enciclopedică, 1997): 410; A se vedea, de asemenea: Iorga, *Cugetări ...*, 298.

³³ Conrad, „Nicolae Iorga și elevii Școlii Române din Paris, la Fontenay-aux-Roses...”, 34.

³⁴ B. Theodorescu, *Nicolae Iorga (1871-1940 – Bibliografie* (București: Editura Științifică și Enciclopedică/Editura Militară, 1976) 81; A se vedea, de asemenea: Stănculescu-Bârda, *N. Iorga – Concepția istorică ...*, 32 și Stănculescu-Bârda, *Nicolae Iorga, așa cum l-au cunoscut ...*, 28.

³⁵ Țurlea, *Scoala română din Franța ...*, 17.

³⁶ Profesorul francez se referă la semestrul predat de geograful francez Emmanuel de Martonne la Universitatea din Cluj în anul 1921, în calitate de profesor aflat sub auspiciile misiunii universitare franceze. A se vedea: *Nicolae Iorga și Universitatea din Cluj – Corespondență (1919-1940)*, București: Academia Română, Fundația Națională pentru Știință și Artă și Institutul de Istorie și Teorie Literară „G. Călinescu”, 2005: 85.



aplauze. Discursul susținut de rectorul P. Appell a fost urmat de discursul diplomatului V. Antonescu, ministrul plenipotențiar al României în Franța, cel care, în numele guvernului român, le-a mulțumit și i-a felicitat pe profesorii N. Iorga și P. Appel pentru dedicarea de care au dat dovadă pentru acest rezultat³⁷. Conform aceleiași publicații, momentul festiv s-a încheiat cu un discurs elocvent rostit de creatorul noii instituții, cel care menționa:

„... tot ceea ce cultura franceză a dat deja României. De asemenea, el a arătat cum va funcționa școala românească, care va include o duzină de rezidenți, desemnați de diferite universități din România, dintre absolvenții și doctorii de litere, filologie, istoricii și artiștii.

Un festival artistic a urmat acestui eveniment frumos”³⁸.



Fotografia nr. VII – Desen în creion al Școlii Române din Fontenay-aux-Roses.

Sursă: Septime Gorceix, *„Les Amitiés Franco-Roumaines. L'école Franco-Roumaine de Fontenay-aux-Roses”*, *Les Annales politiques et littéraires – Revue Universelle, illustrée hebdomadaire*, nr. 2122 – 24 februarie 1924, Accesat în data de 19 decembrie 2018. www.gallica.fr.

în prima perioadă de funcționare, urmând directivele stricte ale lui N. Iorga. Într-o scrisoare trimisă către N. Iorga, în data de 4 iulie 1922, V. Ianculescu remarca modul în care: „Fontenay-ul a devenit cel mai filoromân oraș din Franța”⁴¹. În anul 1923, N. Iorga a analizat evoluția instituției în articolul

A doua zi, în data de 2 iulie 1922, a avut loc lansarea oficială a activității Școlii, iar în acest sens s-a organizat o serbare pentru locuitorii localității Fontenay-aux-Roses. Aceștia, pentru a-și manifesta simpatia față de România, au cerut să fie intonat imnul național al României în cadrul festivității³⁹, momentul fiind, de asemenea, menționat în memoriile lui N. Iorga⁴⁰. După festivitatea de deschidere, juristul Victor Ianculescu a fost desemnat să se ocupe de coordonarea efectivă a instituției,

³⁷ „Le Temps”, anul 62, nr. 22.247 – 3 iulie 1922: 3.

³⁸ „Le Temps”, anul 62, nr. 22.247 – 3 iulie 1922: 3.

³⁹ Țurlea, *Scoala română din Franța ...*, 17.

⁴⁰ Iorga, *Memorii ...*, 309.

⁴¹ Țurlea, *Scoala română din Franța ...*, 17.

„Școala Romanească din Fontenay- aux-Roses”, axându-se pe modul în care V. Ianculescu s-a ocupat de coordonarea edificiului educațional:

„Îngrijirea exemplară a dlui sub. director Victor Ianculescu, foarte bine cunoscut în cele mai distinse cercuri franceze, face ca instalația noastră să poată fi privită ca model pentru asemenea așezăminte.

Acolo dl. C. Marinescu a făcut lucrări de istorie care i-au asigurat stima profesorilor francezi, acolo dl. Alexandru Rosetti și-a redactat articolele pentru marea revistă de filologie “Romania”, acolo dl. N. Constantinescu și-a orânduit notele pentru chestia țărănească în Imperiul bizantin, acolo dl. Sanciu, Lambrino și Munteanu au cultivat științele filologice și d. Virgil Bogdan și-a pregătit studiile de filosofie; acolo și-a zugrăvit pânzele pictorul de mare talent care e Catul Bogdan. Am găduit și pe un tânăr filolog sas dl. Folberth. O bibliotecă neconținut adăugită stă la îndemâna cercetătorilor.

S’au primit multe vizite plăcute și unele de le represintanți iluștri ai nației prietene. Fototipia de față – reproducă și în acest studiu, n.n. – înfățișează între noi pe generalul Berthelot, atâta timp unul dintre sprijinatorii speranțelor noastre”⁴².

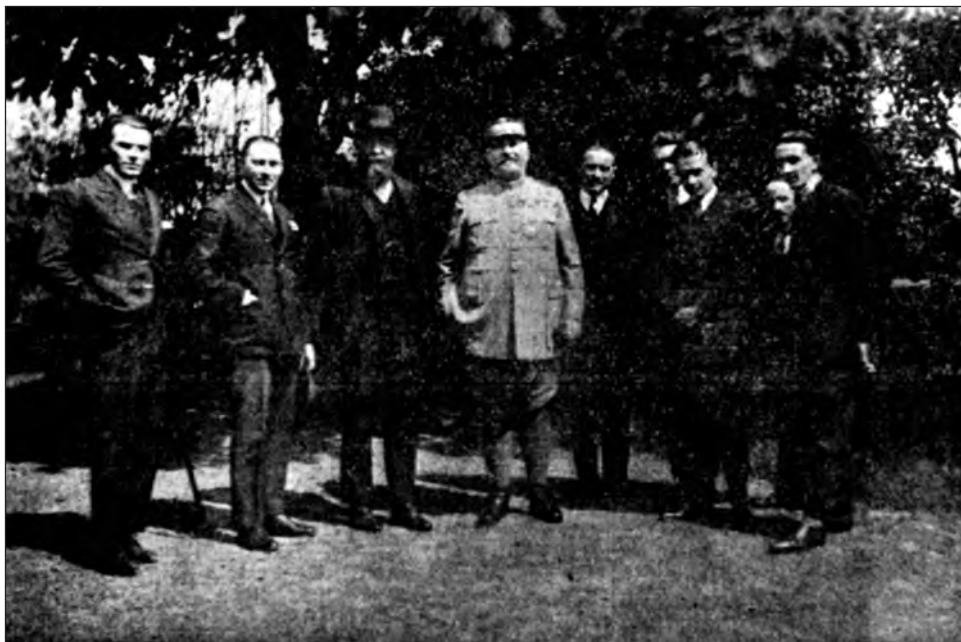
Funcționarea școlii sub coordonarea lui V. Ianculescu a cunoscut o evoluție fulminantă, acesta reușind să transforme o casă simplă cu două etaje într-o veritabilă unitate educațională: 12 camere, câte una pentru fiecare student, o sală de studiu, o bibliotecă de peste 3.000 de volume, un atelier de artă, săli de expoziție (pentru arta românească și pentru arta populară). Pentru toate aceste merite, directorul instituției românești a fost propus de autoritățile franceze, în anul 1923, pentru Legiunea de Onoare, în grad de cavalier.

Principalele rezultate obținute de bursierii români, în urma cercetătorilor întreprinse în Franța, în calitate de elevi ai Școlii din Fontenay-aux-Roses, vor fi publicate din anul 1923, în revista anuală “Mélanges de l’École Roumaine en France”⁴³. Dacă analizăm funcționarea concretă a instituției, din prima perioadă de funcționare a acesteia, constatăm că aceasta găzduia anual 12 bursieri, exclusiv bărbați – până în 1927 –, ce dețineau licențe în filologie sau istorie susținute în România la una dintre universitățile: București, Iași, Cluj și Cernăuți, plus un pictor sau sculptor, ce era ales dintre laureații Școlilor de Artă din București sau Iași⁴⁴. Cursanții aleși aveau o serie de obligații pe care aveau îndatorirea să le respecte. Istoricii și filozofii aveau obligația de a susține anual o cercetare științifică, iar artiștii plastici erau nevoiți să prezinte o operă artistică. În ultima parte a acestui proces de verificare a activității bursierilor, aceștia erau obligați să susțină un memoriu în fața directorului școlii cu privire la întreaga activitate

⁴² Iorga, *Școala Românească din Fontenay-aux-Roses ...*, 103.

⁴³ Nastasă, *Itinerarii spre lumea savantă ...*, 209.

⁴⁴ Jean-Yves Conrad, *Paris, capitala... României. Ghid al plimbărilor insolite pe urmele românilor celebri din Paris*, trad. Elisabeta Balint (Iași: Editura Junimea, 2006): 318.



Fotografia nr. VIII – Istorical N. Iorga, generalul H. Berthelot, conducerea instituției educaționale și câțiva studenți la Școala Română din Fontenay-aux-Roses în anul 1923.

Sursă: N. Iorga, „Școala Românească din Fontenay-aux-Roses” în *Cele Trei Crișuri – Revistă de Cultură*, Anul al IV – lea, Nr. al VII -lea – iulie 1923: 103.

întreprinsă în universitățile și bibliotecile franceze⁴⁵. Întrucât veniturile bursierilor erau insuficiente, așa cum menționam anterior, și având în vedere costurile vieții de zi cu zi din Franța acelei perioade, statul francez a acordat burse nominale de 800 de franci, la care se adăugau cei 300 de franci oferiți de școală⁴⁶. În anul 1936, N. Iorga rememora, în volumul „Școala Nouă” de Istorie – O lămurire definitivă”, momentul în care a fost creată și modul în care funcționa Școala Română din Fontenay-aux-Roses, raportându-se la foștii săi studenți cu care nu se mai afla în cele mai apropiate legături, după trecerea anilor:

”La școala, pe care eu am întemeiat-o prin proiectul de lege depus de mine, de la Fontenay-aux-Roses, ca și pe cea din Roma, am căutat prin toată influența pe care o aveam într’un Consiliu de Facultate unde, din cauza jignirilor nesancționate, nu mai pot călca de ani de zile, și nu fără pagubă pentru Facultate, ajunsă în minile unei clice de caracter vădit politic, să-i fac a ajunge la aceste școli menite să puie pe absolvenții Universităților noastre în legătură cu lumea științifică și cu întreaga cultură din Franța și din Italia. În acea școală pe care o conduceam eu, puind la îndemina membrilor ei prețioasele legături personale pe care le pot avea ca pro-

⁴⁵ Conrad, *Paris, capitala... României ...*, 318.

⁴⁶ Conrad, *Paris, capitala... României ...*, 318.



Fotografia nr. IX – Școala Română de la Paris, Fontenay-aux-Roses în anul 1925. Rândul de jos, de la stânga la dreapta: Ion Chinezu, Ion Ianculescu, Nicolae Iorga, I. M. Rașcu, Richard Hette. Rândul de sus, de la stânga la dreapta: Bazil Munteanu, Dumitru Murarasu, Petre P. Panaitescu, Vlad Bănățeanu, Vasile Băncilă, Dan Băjenaru.

Sursă: Elena Ilie, „Vasile Băncilă și P.P. Panaitescu. Pagini de corespondență” în *Acta Musei Tutovensis*, nr. 1 – 2015: 46.

fesor agreat la Sorbona și ca unul din pușinii membri asociați ai Institutului de Franța, am avut o deosebită grijă și, în ce privește sănătatea zdruncinată a unora dintr’înșii, pentru aceia cărora credeam că li voi fi lăsat sentimente care mă iluzionam că-mi sînt datorite. (...)

*Biblioteca pe care, cu ajutorul atît de harnicului conducător permanent, ca subdirector, al școlii, d. Victor Ianculescu, am adunat-o în frumoasa clădire cumpărată de mine*⁴⁷.

Ultima perioadă din istoria Școlii Române din Franța a fost nefastă, fiind marcată de cursul evenimentelor lugubre ce s-au abătut asupra continentului european. În anul 1940, după ocuparea Parisului de către trupele germane, Școala Română din Fontenay-aux-Roses își va înceta activitatea. Ulterior, în luna mai 1941, printr-un nou Decret-lege de reorganizare a celor două școli, Școala Română din Paris și „sora ei italiană” au reintrat în unele dintre atribuțiile lor inițiale și au fost numiți doi noi directori: Scarlat Lambri-
no (1891-1964) – Școala Română din Roma și C. Marinescu (1891-1982) –

⁴⁷ N. Iorga, „Școala Nouă” de Istorie - O lămurire definitivă (Vălenii-de-Munte: Tipografia „Dacina Românească”, 1936): 5.



Școala Română din Paris⁴⁸. Se pare că fostul director al instituției, V. Ianculescu a rămas în cadrul Școlii până în 1942⁴⁹, însă fără a avea o funcție de primă importanță în organigrama internă. În ciuda redeschiderii, condițiile de funcționare ale Școlii Române din Franța au fost vitregite de vremurile în care își desfășura activitatea, studenții fiind în imposibilitatea de a ajunge în Franța din cauza războiului ce cuprinsese întregul continent. De asemenea, studenții aveau obligația de a face dovada că „*au luptat cel puțin 6 luni pe frontul de Răsărit în actualul război*”⁵⁰. Acest fapt îl va face pe C. Marinescu să solicite Academiei Române să îi recunoască drept bursieri temporari pe nouă dintre tinerii români aflați la studii la Paris⁵¹. În anul 1947 apar alte probleme în funcționarea Școlii, iar ulterior, în anul 1948, după ce puterea comunistă reușește să preia toate pârghiile de conducere ale fostului Regat al României, prin noua „Lege a Învățământului”, cele două Școli au fost desființate oficial⁵², sub semnătura nomencluristei Ana Pauker (1893-1960). Sub această lege a intrat și destinul istoricului C. Marinescu, ultimul director al Școlii Române din Franța, acesta fiind demis din funcția de conducere, exclus din Academia Romană, iar în acest context marcat de numeroase vicisitudini a ales să se stabilească în Occident pentru restul vieții⁵³.

Negura comunismului a afectat iremediabil soarta instituției din capitala Franței, aceasta fiind marcată de incertitudine, în anii următori. În anul 1960⁵⁴ – sau 1962 –, clădirea a fost vândută de statul român comunist companiei cu specific imobiliar „Val Content”⁵⁵, iar în anii următori clădirea istorică a fost demolată⁵⁶, pe terenul respectiv construindu-se blocuri de locuințe⁵⁷. Situația actuală a locației este tristă, întrucât nimic nu amintește de locul în care, în perioada interbelică, se pregăteau generațiile de tineri intelectuali români, numele străzii fiind schimbat din „Châtaigniers” în „Jean Lavaud”⁵⁸. Conform istoricu-

⁴⁸ Nastasă, *Itinerarii spre lumea savantă ...*, 209.

⁴⁹ A se vedea: „La Croix pour le sous-directeur de l'École Roumaine? (1923)”.

⁵⁰ Veronica Turcuș, Șerban Turcuș, *Între cultură, șantaj și spionaj. Accademia din Romania la crepuscul (1947-1955) - Studiu și documente* (Cluj-Napoca: Editura Școala Ardeleană, 2017): 8-9.

⁵¹ Turcuș, Turcuș, *Între cultură, șantaj și spionaj ...*, 9.

⁵² Nastasă, *Itinerarii spre lumea savantă ...*, 209.

⁵³ Turcuș, Turcuș, *Între cultură, șantaj și spionaj ...*, 9-n. 5.

⁵⁴ Virgil Căndea, *Mărturii românești peste hotare. Creații românești și izvoare despre români în colecții din străinătate*, Vol. al II - lea – Finlanda-Grecia, ed. I. Feodorov (București: Editura Biblioteca Bucureștilor, 2011): 12.

⁵⁵ A se vedea: „La Croix pour le sous-directeur de l'École Roumaine? (1923)”.

⁵⁶ Nastasă, *Itinerarii spre lumea savantă ...*, 208-n. 162.

⁵⁷ Căndea, *Mărturii românești peste hotare ...*, 12.

⁵⁸ „La Croix pour le sous-directeur de l'École Roumaine? (1923)”.

lui L. Nastasă, în perioada actuală, în zona Școlii Române din Fontenay-aux-Roses și-a găsit locul o importantă arteră de circulație⁵⁹.

După căderea comunismului a existat o tentativă de revitalizare a spiritului instituției. Astfel, în data de 2 aprilie 1997, prin adresa nr. 31, Biroul Permanent al Camerei Deputaților, în conformitate cu art. 86 din Regulamentul Camerei Deputaților, a sesizat pentru examinare și avizare Comisia pentru Buget, Finanțe și Bănci cu privire la propunerea legislativă de Reînființare a Școlii Române din Franța⁶⁰. În urma dezbaterilor proiectul a primit aviz „negativ” din partea Comisiei pentru Buget, Finanțe și Bănci, în data de 22 aprilie 1997. Curios este faptul că acest aviz a fost acordat cu majoritatea voturilor, întrucât, în viziunea membrilor comisiei de analiză din expunerea de motive și din propunerea legislativă, nu rezultau cu claritate și fără echivoc următoarele elemente: „Ce rol ar fi urmat să aibă viitoarea instituție – unitate de studiu (institut sau bibliotecă) sau unitate de cazare – internat sau cămin –?”, „Care era relația dintre universitățile românești ce urmau să selecteze studenții pentru burse și instituțiile de învățământ franceze unde aceștia urmau să studieze?”, „Bursele de studiu vor fi oferite de universitățile românești sau de cele franceze?”, „Instituția va avea caracter universitar sau postuniversitar?”, „Ce recunoaștere vor avea diplomele obținute după stagiile efectuate la instituția de învățământ?”, „Cine anume va suporta cheltuielile de funcționare pentru această instituție și salariile personalului – luându-se în calcul că Ministerul Învățământului și Academia Română nu au capitalul bugetar pentru acest gen de cheltuieli în afara țării –?”. În finalul avizului negativ se constata lipsa unui imobil unde ar putea funcționa instituția, întrucât fosta locație a fost vândută după desființarea Școlii Române din Franța în anul 1948⁶¹. După această propunere laudabilă, o astfel de inițiativă nu a mai fost luată în calcul de nici un alt membru al legislativului român și astfel a încetat definitiv o parte din spiritul românesc în Franța.

Școala Română din Fontenay-aux-Roses a facilitat formarea majorității istoricilor români din perioada interbelică și a contribuit la formarea unui număr important de oameni de cultură, iar multe din studiile acestora au fost documentate sau publicate sub egida acestei instituții. În România actuală, idealul generației de istorici români – în special a istoricilor ce sunt angrenați în cariere diplomatice – ar putea fi revitalizarea acestui laudabil proiect inter-

⁵⁹ Nastasă, *Itinerarii spre lumea savantă ...*, 208-n. 162.

⁶⁰ A se vedea documentul: „Avizul asupra propunerii legislative privind reînființarea Școlii Române din Franța” București: Parlamentul României – Camera Deputaților – Comisia pentru Buget, Finanțe și Bănci, nr. XXXVI/2/214 din 22.04.1997: 1. Accesat 19 noiembrie 2018, <http://www.cdep.ro/comisii/buget/pdf/1997/av031.pdf>.

⁶¹ „Avizul asupra propunerii legislative privind reînființarea Școlii Române din Franța...”, 1.



belic. Bucureștiul deține un monumental Institut Francez, ce continuă vechea tradiție franco-română, fiind un loc în care se simte și se trăiește franțuzește în mijlocul capitalei României. De asemenea, diplomația culturală franceză își face simțită prezența în Iași, Cluj și Timișoara prin institute culturale de anvergură și în restul orașelor mari ale României și Republicii Moldova prin sistemul educațional „Alianța Franceză”. În fața acestui adevărat exercițiu de diplomație culturală, statul român încearcă să își promoveze cultura și valorile pe tărâm francez prin I.C.R., entitate ce ține de Ambasada României la Paris, și prin proiectul „La Maison Roumaine” al profesorului și ambasadorului Alexandru I. Herlea(n. 1942). Dacă aceste proiecte sunt suficiente pentru reprezentarea în sfera diplomației culturale a statului român, istoria și viitorul vor decide. O nouă Școală Românească în Franța ar putea recupera o parte din acest decalaj, iar memoria Școlii Române din Fontenay-aux-Roses merită să fie adusă în prim planul vieții culturale româno-franceze ori de câte ori acest lucru este cu putință. Poate că în anii sau deceniile viitoare se vor găsi oamenii de stat capabili să refacă din propria cenușă această „Pasăre Phoenix” a culturii, educației și diplomației românești.

Rezumat

Începutul secolului al XX-lea a fost puternic marcat de Primul Război Mondial, iar între rezultatele neprevăzute de după acesta constatăm o creștere exponențială a relațiilor culturale dintre state implicate în aceleași tabere combatante. Dacă analizăm, în mod expres, relațiile culturale româno-franceze din această perspectivă, constatăm că avem de a face cu un adevărat exemplu de colaborare culturală pe continentul european, întrucât rar au mai existat alte exemple de conlucrare atât de pronunțate. Primul pas concret al acestui proces lăudabil a fost semnarea, în data de 15 iunie 1919, la București, Convenției Educaționale Poincaré-Angelescu, convenție prin care statul francez se oferea să își ofere suportul său pentru consolidarea învățământului românesc în special în noile provincii ce intrau în componența statului român. Astfel, lua naștere la București misiunea universitară franceză, ca entitate de sine stătătoare, izvorâtă din această convenție, iar ulterior, în anul 1924, era înființat Institutului Francez de Înalte Studii. Prin cele două acțiuni concrete, statul francez prelua inițiativa și oferea sprijinul promis pentru „sora latină din estul Europei”. În aceeași perioadă, acțiunile Regatului României, în acest sens, au fost mult mai anevoioase, fiind nevoie de o inițiativă privată a istoricului N. Iorga pentru ca mediul politico-educational de la București să discute posibilitatea de înființare a Școlilor Române din Franța și Italia. În privința Școlii Române din Franța, istoricul N. Iorga se va ocupa de toate demersurile pentru a vedea fiabilă

această instituție: alegând o clădire în pitoreasca localitate din suburbia Parisului - Fontenay-aux-Roses, pe care o va cumpăra în numele statului român, propunând legea specială în Parlamentul României, intervenind în mediul politic francez, pe toate căile disponibile, pentru a vedea proiectul realizat, și supervizând întreaga entitate educațională pentru întreaga sa viață. Inaugurarea oficială a Școlii Române din Fontenay-aux-Roses a avut loc în data de 1 iunie 1922, iar din acel moment localitatea și școala au devenit cele mai importante locuri ale studenților români din Franța. Funcționarea școlii a facilitat accesul doctoranzilor români, în domeniile umaniste, la resurse livrești indispensabile pentru studiu și creație, iar majoritatea istoricilor români cu studii importante în perioada interbelică au beneficiat de burse în interiorul școlii. Instaurarea comunismului a distrus acest loc dedicat învățământului românesc, întâi prin închiderea porților și, ulterior, prin vinderea întregului stabiliment. După vânzare, în anii următori, clădirile stabilimentului au fost dărâmate pentru construirea unor facilități moderne și astfel s-a așternut uitarea peste ceea ce a fost Școala Română din Franța. În anul 1997, în Parlamentului României a existat propunerea ca acest proiect interbelic să fie revitalizat, însă propunerea s-a lovit de avizul negativ al comisiilor specializate și niciodată nu a mai fost discutată această posibilitate.

Cuvinte cheie: Școala Română din Franța, Nicolae Iorga, Fontenay-aux-Roses, cultură română, bursă de cercetare.

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Трансформация этнического состава населения украинского Подунавья: к вопросу о переселении молдаван/румын на Дальний Восток (1947-1949 гг.)

Лилия ЦЫГАНЕНКО

Abstract

Based on previously unpublished archive documents (Ismail, Ukraine), the organization and resettlement of parts of the residents from the lower Danube region to South Sakhalin in 1947-1949 are considered. First of all, the resettlement touched the representatives of the Moldovan/Romanian ethnic group living in Reni district. This relocation should be seen as an attempt from the part of the Soviet totalitarian regime to transform the ethnic composition of the region, having evicted the part of the local population to remote corners of the Soviet empire, which, without much enthusiasm, met the socialist changes of the second half of the 1940s and related to the collectivization of agriculture. The age, gender, and quantitative indicators are analyzed. Lists of immigrants to the South Sakhalin in 1947 and 1948 are given.

Keywords: Podunavia, South Sakhalin, resettlement, Moldavian fishermen-farmer.

Одним из действительных страхов советского тоталитарного режима была боязнь объединения части жителей страны под лозунгами национальной идеи. И не важно, о какой идее шла речь – украинской или молдавской, грузинской или татарской. Главный подход в данном вопросе – не допустить компактного проживания представителей одной этнической группы вместе. Поэтому миграционная политика стала важнейшей составляющей частью деятельности партийно-советских властей. Желание разбить национальное единство, «перемешать» и «разбавить» компактно проживающие народы представителями других этнических групп, стереть из памяти национальные традиции и культуру, – вот далеко не полный перечень целей тоталитарного коммунистического государства на пути к созданию безликой массы под громким именем «советский народ».

Вопросы миграционной политики давно находятся в поле научного внимания ученых разных стран. Среди публикаций последних лет сле-

дует назвать труды Р. Шевченко¹, И. Кашу², П. Поляна³, К. Курдогло⁴, В. Пассата⁵, В. Сергийчука⁶, Д. Хаваджи⁷ и др. В большинстве из указанных работ основное внимание сосредоточено на массовых акциях коммунистического режима по депортации населения – таких как операции «Запад», «Юг» и др. Операции по «добровольно-принудительному» переселению регионального характера пока еще находятся вне внимания историков. К одной из таких региональных операций относится компания по переселению рыбаков-колхозников из Южной Бессарабии на Южный Сахалин в 1947-1949 годах. Анализ практики переселения позволит охарактеризовать миграционные процессы в целом по стране, а также выявить особенности их проведения в отдельно взятом регионе.

Источниками для нашей работы послужили архивные материалы, которые хранятся в фондах Измаильского архива. Это фонды р-811 Исполнительный комитет Ренийского районного совета депутатов трудящихся (город Рени, Измаильской области)⁸ и р-424 Статистическое управление Измаильской области (облстат)⁹. В документах содержатся сведения, ранее не цитировавшиеся в научной литературе, а именно распоряжения и приказы о создании комиссий по отбору рыбаков для отправки на Сахалин, протоколы заседаний отборочных комиссий, списки переселяемых семей, переписка между украинскими и сахалин-

¹ Руслан Шевченко. „Советская политика организованной миграции. Пример Молдавской ССР (1940-1971 гг.). Часть I: 1940-1941, 1944-1956 гг.” *Plural: History, Culture, Society*, vol.4, nr. 2, (2016): 46-80.

² Igor Casu. „Teroarea comunistă în Moldova sovietică și reabilitarea memoriei,” *Pontes. Review of South East European Studies*, vol. 3-4, (2009): 213-244.

³ Павел Полян. „Не по своей воле: История и география принудительных миграций в СССР”, Москва: О.Г.И Мемориал, 2001. <http://old.memo.ru/history/deport/index.htm>; <http://www.demoscope.ru/weekly/knigi/polian/polian.html>

⁴ Константин Курдогло. *Репрессии и депортации гагаузов 1940- 1941 гг., 1944-1952 гг.: книга судеб: люди, события, документы* (Кишинёв, 2016), 744 с.

⁵ Валерий Пассат, *Трудные страницы истории Молдовы. 1940-1950 гг.* (Москва: Терра, 1994), 800 с.

⁶ Володимир Сергійчук. *Депортація українців до Казахстану* (Вишгород: ПП Сергійчук М.І., 2017), 286 с.

⁷ Д. Хаваджи. „Застосування депортацій тоталітарним режимом у СРСР щодо представників різних народів, соціальних груп і конфесій”, *Вісник Харківського національного університету*, (2002): 202-208.

⁸ Измаильский архив (ИА), Ф. р-811. Исполнительный комитет Ренийского районного совета депутатов трудящихся (г. Рени, Измаильской области).

⁹ Измаильский архив (ИА), Ф. р-424. Статистическое управление Измаильской области (облстат) Исполнительного комитета областного совета депутатов трудящихся, город Измаил (1944-1954 гг.).



скими органами исполнительной власти, статистические данные о процессе переселения.

Окончание Второй мировой войны привело к интенсификации миграционных процессов, в которые оказались вовлечены миллионы людей. Исследователь Дмитрий Манкевич выделяет 9 типов миграций, которые были характерны для послевоенного периода. Это:

- заселение новых территорий (например, Южный Сахалин);
- депортация;
- переселение на опустевшие после предыдущих депортаций территории жителей центральных регионов страны;
- иммиграция;
- эвакуация и реэвакуация;
- демобилизация;
- репатриация;
- организованная миграция (следствие функционирования системы организованных наборов);
- стихийная миграция сельского населения в города¹⁰.

Практически все из названных видов миграционных процессов имели место на территории Подунавья, отошедшей к СССР еще перед началом Второй мировой войны. Однако в этот период миграционная политика не получила в регионе особого распространения, что объясняется наличием многочисленного разно-этнического местного населения. Проведение политики коллективизации в регионе наглядно продемонстрировало незначительную поддержку советской власти со стороны местного населения. Оказалось, что у советской власти не так уже и много сторонников, а большинство местного населения (румыны/молдаване, болгары, украинцы, гагаузы и др.) весьма настороженно относятся к коммунистическим перспективам развития региона. Власть приступает к осуществлению жестких мер (депортация, выселение, репрессии), одним из результатов которых должно было стать коренное изменение этнической составляющей Подунавья. Переселение жителей молдавских/румынских сел Ренийского района на Дальний Восток было одним из звеньев этой политики.

В соответствии с решением Ялтинской конференции (1945 г.) в состав СССР, кроме других территорий, был включен Южный Сахалин, который позднее (в 1947 году) вошел в состав Сахалинской области. Выселил

¹⁰ Дмитрий Манкевич. „Миграции населения СССР в первые послевоенные годы и заселение Калининградской области (1945-1950 гг.)”, <https://zapadrus.su/slavm/ispubsm/1951-migratsii-naseleniya-sssr-v-pervye-poslevoennye-gody-i-zaselenie-kalininogradskoj-oblasti-1945-1950-gg.html>

с Сахалина почти 300 тыс. человек, местная администрация столкнулась с проблемой дефицита трудовых ресурсов как в промышленности, так и в сельском хозяйстве. Советским и партийным органам необходимо было изыскивать возможности «...кадрового обеспечения трудодефицитных отраслей народного хозяйства»¹¹.

28 августа 1947 года Совет Министров СССР принимает постановление № 3014 «О репатриации из Сахалинской области японских военнопленных и интернированных гражданских лиц и о переселении колхозников и другого сельского и городского населения в Сахалинскую область для работы в промышленности и на транспорте»¹². Предполагалось во втором полугодии 1947 года и первом полугодии 1948 года переселить в Сахалинскую область для постоянной работы 22 500 семей колхозников из разных республик, краев и областей. В приложениях к постановлению устанавливались четкие квоты для переселения. Украинская ССР должна была отправить 2 000 семей, из которых 500 – рыбаки-колхозники.

18 сентября 1947 года Совет Министров УССР принимает постановление об организации переселения с украинских территорий на Южный Сахалин, а 24 сентября того же года Измаильский облисполком постановлением № 827 начинает организацию отправки 200 семей рыбаков-колхозников в Сахалинскую область. Для этой цели при сельских и районных советах создавались отборочные комиссии по переселению, для которых были разработаны четкие инструкции:

- ✓ отбор желающих осуществляется только на добровольной основе;
- ✓ в списки можно включать не только рыбаков-колхозников, а любых работников сельскохозяйственных артелей, которые выразят желание переселиться на Сахалин;
- ✓ администрация обязана безотлагательно освобождать колхозников и членов их семей от работы и готовить документы;
- ✓ в каждой семье переселенцев должно было быть не менее двух работоспособных¹³.

Кроме этого, в первых числах октября 1947 года, была создана областная отборочная комиссия, которую возглавил С. Ваганов. Формирование команды переселенцев необходимо было провести в 6 районах Измаиль-

¹¹ Сергей Пискунов. „Политика сельскохозяйственного переселения и ее реализация на юге Дальнего Востока СССР: середина 40-х - середина 60-х гг. XX века”, PhD, (Хабаровский университет, 2005).

¹² Решения партии и правительства по хозяйственным вопросам, 1917- 1967 гг. Т.3. 1941 - 1952 гг. (Москва: Политиздат, 1968): 381-427.

¹³ ИА, Ф. р-811, оп.1, д. 38, л. 1.



ской области – Ренийском, Суворовском, Килийском, Лиманском, Старокозацком, Бородинском¹⁴.

Первые дни работы комиссий оказались безрезультатными – желающих не было. И тогда представители местной администрации, понимая, что указание свыше должно быть выполнено при любом раскладе, переходят к политике «кнута и пряника».

Во-первых, была расширена зона поисков желающих: к указанным ранее 6 районам Измаильской области были добавлены еще два – Татарбунарский и Тузловский.

Во-вторых, усилена персональная ответственность членов отборочных комиссий за выполнение плана переселения. 10 октября 1947 года на очередном заседании областной комиссии по отбору рыбаков-колхозников был вынесен вердикт: «Ход отбора рыбаков-колхозников на Сахалинскую область признать абсолютно неудовлетворительным; ... Особо подчеркиваем, что некоторые товарищи, которые были командированы на выполнение этого задания, отнеслись к его выполнению формально и безответственно»¹⁵. В каждый район области был направлен ответственный работник, который должен был контролировать ход компании.

В-третьих, особое внимание было уделено популяризации переселения. Другими словами необходимо было провести масштабную рекламную кампанию, привлекая местных жителей перспективами высоких зарплат, продуктовыми пайками, налоговыми льготами и финансовой помощью. В очередном постановлении облисполкома указывалось: «Учитывая государственную важность этого мероприятия... особое внимание уделить проведению массово-разъяснительной работы..., популяризации условий переселения, льгот для переселенцев»¹⁶. У местных крестьян, разоренных коллективизацией и обескровленных голодом 1946-1947 годов, подобные предложения могли найти отклик. На помощь партийным функционерам подключилась региональная пресса. Так, в № 79 газеты «Сталинец» (орган Суворовского районного комитета КП(б)У и райсовета депутатов трудящихся) была напечатана большая статья под названием «Южный Сахалин», в которой редакция пыталась убедить читателей в необходимости и перспективности переселения на остров. Аргументы сводились к следующим позициям: «...есть много долин, пригодных для сельского хозяйства», «количество осадков... дает возможность успешно заниматься сельским хозяйством», «...наличие богатых кормовых

¹⁴ ИА, Ф. р-811, оп.1, д. 38, л. 2.

¹⁵ ИА, Ф. р-811, оп.1, д. 38, л. 2-2 об.

¹⁶ ИА, Ф. р-811, оп.1, д. 38, л. 3.

угодий», «советский Южный Сахалин имеет блестящие перспективы дальнейшего развития»¹⁷.

В-четвертых, к переселению пытаются привлечь любую мало-мальски подходящую кандидатуру, часто используя методы запугивания и угроз. И даже если человек не являлся членом колхоза, но был согласен на переезд, принималось решение оформлять на него документы и включать в список переселенцев. Так, Ренийская отборочная комиссия (17.10.1947 г.) рекомендовала к включению в список на переселение 4-х человек, однако им всем было отказано комиссией в области. Ответ на причину данного решения находим в архивном документе. Лунгу Степан Петрович (с. Лиманское): «...работая председателем Лиманского сельского совета имел связь с кулаками. ... вместо того, чтобы применять к ним соответствующие меры наказания, ... предупреждал их, чтоб они успели спрятать хлеб и не сдавать его государству»¹⁸. Белалы Алексей Николаевич (с. Лиманское): в 1945 году его отправили по трудовому набору на работу «...в промышленный сектор республики. ... Он сбежал и сейчас находится под следствием»¹⁹. Понта Иван Федорович, рыбак-единоличник (с. Новосельское, Измаильской области) – отказать по «причине плохого здоровья»²⁰ (на момент предполагаемого переселения ему было уже 55 лет). Демченко Семен Фомич (с. Новосельское) получил отказ потому что «...он не рыбак, работает в бухгалтерии колхоза «Большевик», ... находится под следствием по обвинению в растрате колхозного зерна»²¹.

В сложных жизненных ситуациях, под угрозой тюремных наказаний, люди готовы были бежать хоть на край света, лишь бы избежать репрессий и преследований со стороны советской карательной машины. Тем более, что в последствии, большинство из предъявленных обвинений оказались сфабрикованными.

Ближе к концу октября 1947 года Ренийская районная отборочная комиссия с трудом подготовила список для отправки на Южный Сахалин, в котором содержались фамилии 28 семей с указанием количества членов семьи и места работы главы семейства (см. Таблица 1). Анализ приведенного списка позволяет нам сделать определенные выводы.

Всего к переселению были подготовлены 103 человека. Большинство среди переселенцев составляли женщины – 56 человек или 54,3%. Из же-

¹⁷ Сталинец, № 79. 02.10.1947.

¹⁸ ИА, Ф. р-811, оп.1, д. 38, л. 4.

¹⁹ ИА, Ф. р-811, оп.1, д. 38, л. 4 – 4 об.

²⁰ ИА, Ф. р-811, оп.1, д. 38, л. 5.

²¹ ИА, Ф. р-811, оп.1, д. 38, л. 6.



лающих переселиться только 60 человек (58,2%) были трудоспособными, остальные – это дети, подростки, старики. Другими словами фактически 1/3 переселенцев были физически не способны участвовать в процессах восстановления экономики Южного Сахалина.

Все переселенцы ехали на Южный Сахалин со своими семьями, в составе которых кроме жен и детей иногда встречались родители, братья и сестры, племянники. Большинство семей переселенцев были небольшими по количеству домочадцев: семьи из 3 человек составляли 28,5%, из 4 человек – 21,4%, из 5 членов семьи – 14,3%. Почти по 4% приходилось на семьи, которые состояли из 6-8 членов. Наиболее многочисленным – 9 человек – было семейство Волковых, глава которого – один из самых возрастных мужчин из списка переселенцев. Кроме жены, сыновей и дочерей, зятьев и невесток, сюда вошли еще братья главы семьи.

Большинство глав семей переселенцев были представлены (см. *Диаграмма 1*) молодыми мужчинами в возрасте от 30 до 39 лет. Они составляли 39,3% (11 человек) от общего количества глав семей. В равных долях были представлены возрастные категории от 20 до 29 и от 40 до 49 лет. Их количество составляло по 6 человек или по 21,4%. Среди желающих начать новую жизнь на Южном Сахалине были мужчины и более старшего возраста. Это Волков Дмитрий и Даалы Василий, которым на момент переселения исполнилось уже по 53 года. В процентном отношении их доля составляла 7,1%. Самые молодые из переселенцев относились к возрастной категории 18-19 лет – их было 10,7% или 3 человека.

Говоря об этнической принадлежности переселенцев, не смотря на то, что в списке мы встречаем украинские, русские, гагаузские фамилии, все 103 человека были обозначены как представители молдавской/румынской национальности²². И еще небольшое наблюдение – среди переселенцев было 2 комсомольца и ни одного члена партии.

Переселение на Южный Сахалин в 1947 году коснулось жителей трех румынских/молдавских сел Ренийского района. Наиболее крупным было село Новосельское (*Сатуново*), в котором на начало 1947 года в 621 дворе проживало 3 088 человек²³. В переселении на Южный Сахалин взяли участие 18 семейств, которые состояли из 69 человек, что составило около 2,5% от общего количества проживающих в селе. Село Долинское (*Анадол*) также относилось к числу крупных населенных пунктов региона. В нем проживало 3 072 человека²⁴, из которых выехало только 13 че-

²² ИА, Ф. р-811, оп.1, д. 38, л. 23.

²³ ИА, Ф. р-424, оп. 1, д. 1, л. 162.

²⁴ ИА, Ф. р-424, оп. 1, д. 1, л. 161

людей или 0,4% населения. В селе Лиманском (*Фрикацей*) к моменту организации компании по переселению проживало 150 человек²⁵, из числа которых на Южный Сахалин выбыли 21 человек или 14%.

Для организации переселения и обустройства на новых местах переселенцы получали часть переселенческих денег на семью, которая колебалась от 1 800 до 3 900 руб.²⁶ Вторую половину выдавали по прибытию на Южный Сахалин. В начале ноября 1947 года первая группа рыбаков-переселенцев из молдавских сел Подунавья отправилась на Южный Сахалин.

Весной 1948 года началась очередная волна организации переселенцев на Дальний Восток²⁷. В начале марта состоялось заседание областной комиссии по переселению, которое приняло решение о подготовке 106 семей для переселения от Измаильской области в город Южносахалинск. Большую часть – 75 семей или 71% должен был предоставить Ренийский район. Это означало, что из района должно было выехать почти в три раза больше семей, чем в предыдущий этап.

Надо признать, что со стороны государства вторая волна переселения была организована лучше. Во-первых, расширился перечень документов, которые должны были представить переселенцы: он состоял из 10 позиций, среди которых кроме паспортов, переселенческого билета, анкет и характеристик были справки из милиции, сельского совета – «о сумме паевых взносов для их перевода по новому месту жительства» и «обменные квитанции на сдачу скота, зерна, фуража», справка для школьников (с указанием класса обучения), медицинские справки на каждого члена семьи и санпаспорт²⁸.

Во-вторых, каждого переселенца обеспечивали продуктами питания на весь период дороги до места назначения. В этот список включались:

- ✓ Крупы – 1 кг на человека на 10 дней;
- ✓ Хлеб – 1 кг на человека в день;
- ✓ Жиры – 0,3 кг на человека на 10 дней;
- ✓ Сахар – 0,5 кг на человека на 10 дней;
- ✓ Конфеты – 0,5 кг на человека на 10 дней²⁹.

В-третьих, власть более внимательно отнеслась к подготовке эшелонов. Определялись три станции (Измаил, Белгород-Днестровский, Ар-

²⁵ ИА, Ф. р-424, оп. 1, д. 1, л. 163.

²⁶ ИА, Ф. р-811, оп.1, д. 38, л. 19.

²⁷ ИА, Ф. р-811, оп.1, д. 38, л. 24.

²⁸ ИА, Ф. р-811, оп.1, д. 38, л. 26.

²⁹ ИА, Ф. р-811, оп.1, д. 38, л. 27.



циз) откуда происходила организованная погрузка в вагоны, которые предварительно должны были пройти санитарную обработку (начальник станции нес за это персональную ответственность). Знакомство с архивными документами неизбежно приводит к выводу о том, что весь процесс переселения напоминал скорее военную операцию, а люди в данном процессе играли роль живого товара: «передать переселенцев по акту представителям железной дороги»³⁰.

В-четвертых, опыт первой волны способствовал тому, что переселенцам рекомендовали брать с собой комплект плотнических и сельскохозяйственных инструментов (пилы, топоры, лопаты и т.д.)³¹. Кроме этого «В связи с отсутствием семян овощей на Сахалине, рекомендуется брать с собой как можно больше семян, ... а также саженцы винограда, абрикос, яблоч, черешни...»³².

В архивном деле есть несколько разных списков с фамилиями переселенцев на Южный Сахалин весной 1948 года, Однако в некоторых мы встречаем вычеркнутые фамилии, напротив других стоят либо восклицательные знаки, либо нули³³. На наш взгляд это свидетельствует о непрямом процессе подготовки переселения.

В окончательный список вошло 75 семей общей численностью 320 человек (см. Таблица 2). И опять, как в 1947 году, среди переселенцев преобладали женщины – 172 человека или 53,7%. По этнической принадлежности большинство переселенцев были румыны / молдаване – 306 человек или 95,6%. Остальные – 10 человек украинцев (3,1%) и 4 человека русских (1,25%)³⁴. Как и в предыдущий раз, среди переселенцев не было коммунистов, однако количество комсомольцев значительно увеличилось – с 2 человек (1947 г.) до 28 (1948 г.). Определенным образом изменился и возраст переселенцев (см. Диаграмма 2).

Большинство глав семей переселенцев (как и в 1947 году) относились к категории 30-39 лет. Они составляли 37,3% (28 человек) от общего количества глав семей. Значительно увеличилось количество глав семей в возрасте от 40 до 49 лет – они составляли 29,3% (или 22 человека).

Слегка уменьшилось количество молодого контингента: главы семейств в возрасте от 20 до 29 лет составляли 16% (или 12 человек), а категория 18-19 лет была представлена только одним человеком (1,3%).

³⁰ ИА, Ф. р-811, оп.1, д. 38, л. 27 об.

³¹ ИА, Ф. р-811, оп.1, д. 38, л. 25.

³² ИА, Ф. р-811, оп.1, д. 38, л. 43.

³³ ИА, Ф. р-811, оп.1, д. 38, л. 28, 29, 30.

³⁴ ИА, Ф. р-811, оп.1, д. 38, л. 34.

Значительно увеличилась категория старшего поколения. Если в 1947 году глав семейств старше 50 лет было всего 2 человека, то в 1948 году их количество составило 12 человек или 16%, причем старшему из переселенцев – Михайлеску Александру Васильевичу на момент событий было уже 59 лет.

На основе приведенных данных мы можем сделать вывод, что во вторую волну переселения на Южный Сахалин вошли люди более старшего возраста, чем в первую. Скорее всего «взросление» контингента переселенцев можно связать с неприятием большинством из них тех социально-экономических изменений, которые насильственно внедряла советская власть на Подунайских землях. И речь, в первую очередь, идет о насильственной коллективизации и обобществлении имущества. При этом надо учесть, что в таких селах Ренийского района, как Новосельское (*Сатуново*), Орловка (*Картал*), Нагорное (*Карагач*) до июля 1946 года проживали только крестьяне-единоличники³⁵, а уже летом 1947 года местная администрация отчитывалась об успешном завершении коллективизации.

В переселении на Южный Сахалин в 1948 году приняли участие жители 5 сел региона. Это Новосельское (*Сатуново*) – 146 человек или 45,6% от общего количества переселенцев, Лиманское (*Фрикацей*) – 30 человек или 9,4%, Орловка (*Картал*) – 135 человек или 42,2%, Плавни (*Барта*) – 12 человек или 3,75%, Нагорное (*Карагач*) – 2 человека или 0,6%. В целом, за два года переселения на Южный Сахалин, румынские/молдавские села Ренийского района потеряли в своем составе от 1 до 34% населения.

Одной из отличительных черт второй волны переселения рыбаков-колхозников из Ренийского района на Южный Сахалин был выезд целыми семейными династиями. Так, в списке переселенцев мы находим: три семьи Белалы, четыре семьи Дунав, по две семьи Карачебан и Тодоровых.

Организация работы по привлечению местных рыбаков-колхозников к переселению требовала определенной дисциплины, честности и настойчивости со стороны представителей местных советских и партийных органов. Среди архивных документов есть сведения, что не все чиновники добросовестно относились к выполнению своих обязанностей. Партийная принадлежность не спасала их от соблазна пожить за чужой счет. В марте 1948 года Ренийский районный исполнительный комитет рассматривал дело С. Чурикова – секретаря Новосельского сельсовета и одновременно исполняющего обязанности уполномоченного от Ренийского райкома партии по колхозу в селе Котловина. Обвинения сводились

³⁵ ИА, Ф. р-424, оп. 1, д. 1, л. 161-166.



к превышению С. Чуриковым должностных полномочий во время весенних полевых работ, халатном отношении к формированию списков переселенцев и утрате части документов, незаконном присвоении части денег переселенцев³⁶.

Третья волна переселения рыбаков-колхозников на Дальний Восток приходится на весну 1949 года. В соответствии в дополнительным распоряжением Совета Министров Украины от 16 декабря 1948 года № 213-р «О переселении в Сахалинскую область рыбаков-колхозников» исполнительный комитет Измаильского облсовета организовал очередную компанию по переселению местных жителей в Сахалинскую область на остров Итуруп. В распоряжении содержались пояснения о природно-климатических и хозяйственных условиях острова: «...климат...и условия на острове Итуруп такие же, как и на Сахалине, за исключением того, что на острове значительно теплее и более развита рыбная промышленность, сельское хозяйство, огородничество, животноводство»³⁷. По новой разрядке команды переселенцев теперь формировались из городского населения региона: Рени – 25 семей, Киля – 55 семей, Болград – 30 семей³⁸.

Ренийская районная администрация выполнила план переселения, организовав команду в составе 29 семей, состоящих из 113 человек³⁹. Этнический состав переселенцев был довольно пестрым. Представители румынской/молдавской этнической группы составляли меньшинство – не более 12%. Это семьи Николая Бозины, Федора Саси, Ивана Маймуляка, Степана Лунгу, Степана Далалы, Дмитрия Раду. Однако все они были отправлены не в Сахалинскую область, а в село Осколково Алейского района Алтайского края⁴⁰.

Пытаясь внедрить колхозную систему в Подунайских землях после окончания Второй мировой войны, советская власть столкнулась с неприятием данной системы со стороны значительной части местного сельского населения. Почти через два года после повторного установления советской власти в регионе оставалось еще много крестьян-единоличников. Для того чтобы «сломать» непокорных тоталитарная система была готова на любые жертвы – репрессии и аресты, насильственное изъятие зерна и голод, раскулачивание и депортация. Переселенческая политика

³⁶ ИА, Ф. р-811, оп.1, д. 38, л. 32.

³⁷ ИА, Ф. р-811, оп.1, д. 38, л. 40.

³⁸ ИА, Ф. р-811, оп.1, д. 38, л. 43.

³⁹ ИА, Ф. р-811, оп.1, д. 38, л. 37-39.

⁴⁰ ИА, Ф. р-811, оп.1, д. 38, л. 45.

коммунистов отличалась особой изощренностью. Иногда это была открытая, прямая депортация – высылка в Сибирь или Казахстан. Чаще использовали такую форму, как мобилизация на трудовой фронт – отправка местного населения на восстановительные работы на промышленные предприятия по всему Советскому союзу. Переселение рыбаков-колхозников относилось именно к такой «скрытой» форме депортации. К тому же, данное переселение носило в себе черты «этнической зачистки» региона, продиктованной желанием власти разбить этнический монолит компактного проживания в крае народов румынской / молдавской национальности, заменив уехавших более лояльным населением из центральных регионов страны. Такая целенаправленная политика тоталитарного коммунистического государства в конечном итоге привела к постепенной трансформации этнической составляющей региона, существенно уменьшив количество представителей немецкой, румынской/молдавской, болгарской, гагаузской национальностей в крае.

Диаграмма 1

**Возраст глав семей, переселившихся на Южный Сахалин
(1947 г.)**

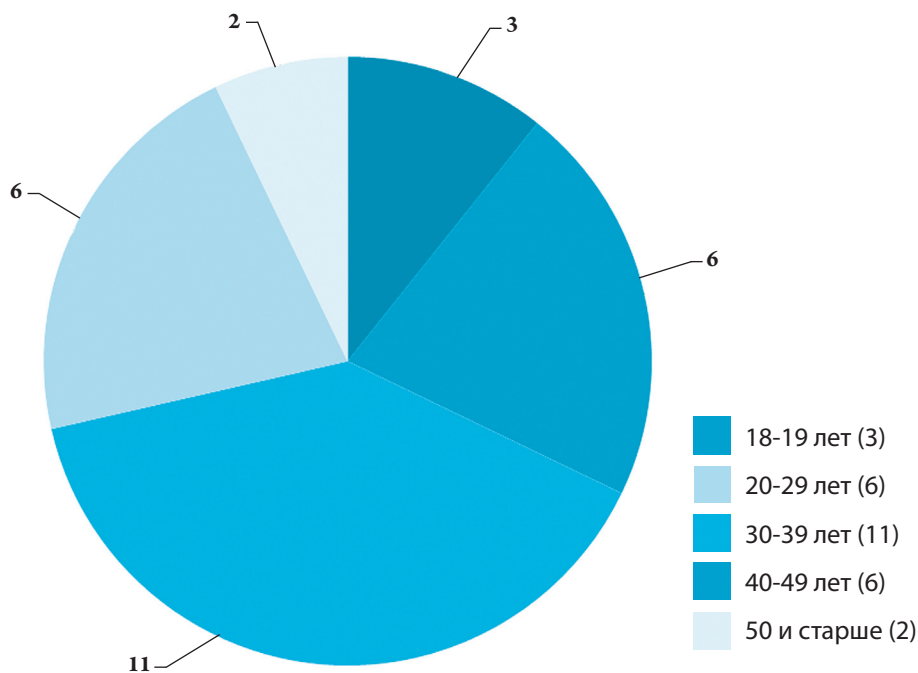


Диаграмма 2

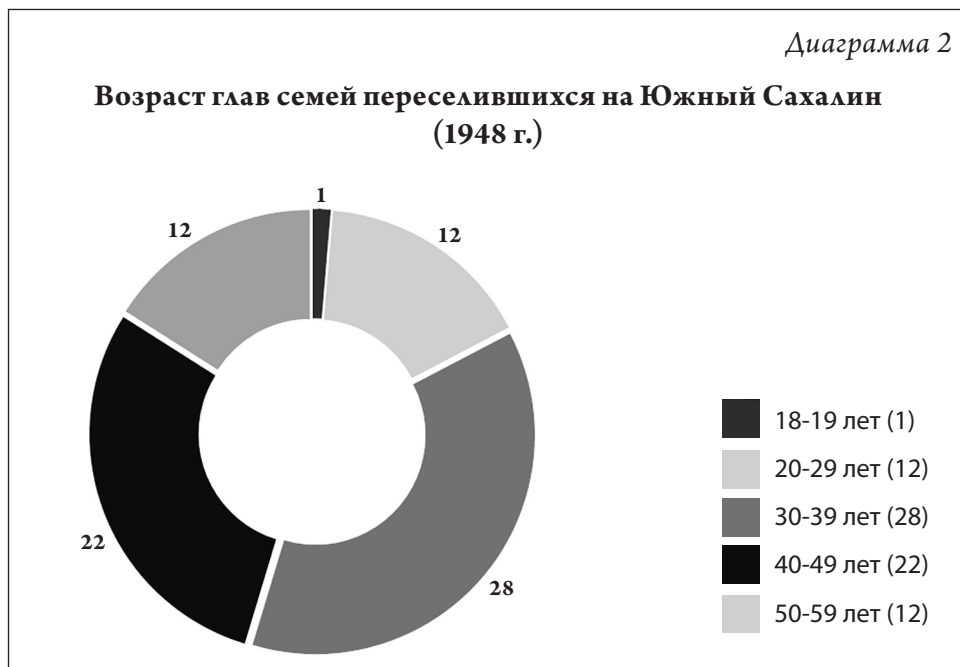


Таблица 1

**СПИСОК
рыбаков-колхозников Ренийского района Измаильской области,
переселенных на Южный Сахалин (1947 год)⁴¹**

№№	Фамилия, имя, отчество	Год рождения	Кол-во членов семьи	Из какого колхоза или сельсовета
1	Плукчи Григорий Афанасьевич	1924	3	рыбколхоз им. Чапаева, с. Долинское
2.	Полукчи Семен Николаевич	1913	3	рыбколхоз им. Чапаева, с. Долинское
3.	Строя Георгий Иванович	1910	1	рыбколхоз им. Чапаева, с. Долинское
4.	Фенду Иван Иванович	1912	2	рыбколхоз им. Чапаева, с. Долинское
5.	Аврам Антон Степанович	1912	4	рыбколхоз им. 28 Июня, с. Лиманское
6.	Греку Филипп Лазаревич	1911	3	рыбколхоз им. 28 Июня, с. Лиманское

⁴¹ ИА, Ф. р-811, оп.1, д. 38, л. 17.

7.	Аждер Петр Афанасьевич	1928	2	рыбколхоз им. 28 Июня, с. Лиманское
8.	Галаджиу Георгий Антонович	1920	2	рыбколхоз им. 28 Июня, с. Лиманское
9.	Стайко Дмитрий Захарович	1914	2	рыбколхоз им. 28 Июня, с. Лиманское
10.	Белалы Илья Константинович	1918	2	рыбколхоз им. 28 Июня, с. Лиманское
11.	Епури Константин Георгиевич	1904	5	сельхозартель «Большевик», с. Новосельское
12.	Даалы Василий Дмитриевич	1894	1	сельхозартель «Большевик», с. Новосельское
13.	Георгов Василий Ильич	1928	1	сельхозартель «Большевик», с. Новосельское
14.	Бурка Антон Иванович	1915	3	сельхозартель «Большевик», с. Новосельское
15.	Митиогло Андрей Степанович	1916	4	сельхозартель «Большевик», с. Новосельское
16.	Дырля Георгий Георгиевич	1899	1	сельхозартель «Большевик», с. Новосельское
17.	Доброта Федор Василевич	1901	6	сельхозартель «Большевик», с. Новосельское
18.	Трифонов Марин Михайлович	1904	2	сельхозартель «Большевик», с. Новосельское
19.	Ефтодий Дмитрий Иванович	1917	3	сельхозартель «Большевик», с. Новосельское
20.	Тодоров Георгий Константинович	1915	1	сельхозартель «Большевик», с. Новосельское
21.	Дойчиогло Федор Андреевич	1910	4	сельхозартель «Большевик», с. Новосельское
22.	Жимбриу Владимир Алексеевич	1919	2	сельхозартель «Большевик», с. Новосельское

23.	Неделко Константин Антонович	1898	1	сельхозартель «Большевик», с. Новосельское
24.	Ефтодий Константин Иванович	1907	4	сельхозартель «Большевик», с. Новосельское
25.	Безерков Трофим Иванович	1921	1	сельхозартель «Большевик», с. Новосельское
26.	Переверзев Андрей Степанович	1920	3	сельхозартель «Большевик», с. Новосельское
27.	Войнов Николай Степанович	1929	1	рыбколхоз им. С. Лазо, с. Новосельское
28.	Волков Дмитрий Демьянович	1894	8	рыбколхоз им. С. Лазо, с. Новосельское

Таблица 2

СПИСОК

**рыбаков-колхозников Ренийского района Измаильской области,
переселенных на Южный Сахалин (1948 год)⁴²**

№№	Фамилия, имя, отчество	Год рождения	Кол-во членов семьи	Из какого колхоза или сельсовета
1	Аждер Антон Иванович	1908	3	колхоз им. 28 Июня, с. Лиманское
2	Белалы Михаил Николаевич	1921	2	колхоз им. 28 Июня, с. Лиманское
3	Саси Николай Никитович	1908	5	колхоз им. 28 Июня, с. Лиманское
4	Аврам Николай Дмитриевич	1909	2	колхоз им. 28 Июня, с. Лиманское
5	Волчанов Федор Павлович	1905	3	колхоз им. 28 Июня, с. Лиманское
6	Белалы Алексей Николаевич	1909	4	колхоз им. 28 Июня, с. Лиманское
7	Стефан Спиридон Николаевич	1912	2	колхоз им. 28 Июня, с. Лиманское
8	Ажигойчу Петр Петрович	1929	1	колхоз им. 28 Июня, с. Лиманское

⁴² ИА, Ф. р-811, оп.1, д. 38, л.29 – 31 об.

9	Дунав Василий Дмитриевич	1912	2	колхоз им. Щорса с. Новосельское
10	Тодоров Михаил Николаевич	1905	3	колхоз им. Щорса с. Новосельское
11	Карачебан Иван Васильевич	1916	2	колхоз им. Щорса с. Новосельское
12	Иванов Федор Константинович	1912	8	колхоз им. Щорса с. Новосельское
13	Даалы Георгий Антонович	1910	5	колхоз им. Щорса с. Новосельское
14	Павлов Сава Иванович	1915	3	колхоз им. Щорса с. Новосельское
15	Дунав Георгий Афанасиевич	1914	2	колхоз им. Щорса с. Новосельское
16	Аполозан Петр Петрович	1915	2	колхоз им. Щорса с. Новосельское
17	Терзи Дмитрий Георгиевич	1902	2	колхоз им. Щорса с. Новосельское
18	Кейбаш Афанасий Николаевич	1918	3	колхоз им. Щорса с. Новосельское
19	Дьяченко Василий Маркович	1912	4	колхоз им. Щорса с. Новосельское
20	Павка Иван Федорович	1892	2	колхоз им. Щорса с. Новосельское
21	Карачебан Кирилл Васильевич	1922	2	колхоз им. Щорса с. Новосельское
22	Войнов Петр Николаевич	1907	4	колхоз им. Щорса с. Новосельское
23	Карачебан Сава Антонович	1922	2	колхоз им. Щорса с. Новосельское
24	Алексе Петр Петрович	1893	5	колхоз им. Щорса с. Новосельское
25	Азман Степан Иванович	1922	3	колхоз им. Щорса с. Новосельское
26	Дину Михаил Федорович	1912	4	колхоз им. Щорса с. Новосельское
27	Кройтору Алексей Георгиевич	1898	5	колхоз им. Щорса с. Новосельское
28	Узун Георгий Павлович	1924	6	колхоз им. Щорса с. Новосельское
29	Арабаджи Афанасий Иванович	1899	5	колхоз им. Щорса с. Новосельское

30	Кеся Мария Ивановна	1923	3	колхоз им. Щорса с. Новосельское
31	Стою Степан Минкович	1902	5	колхоз им. Щорса с. Новосельское
32	Узун Иван Петрович	1892	4	колхоз им. Щорса с. Новосельское
33	Михайлеску Александр Васильевич	1889	3	колхоз им. Щорса с. Новосельское
34	Русан Георгий Павлович	1901	4	колхоз им. Щорса с. Новосельское
35	Тодоров Яков Михайлович	1915	3	колхоз им. Щорса с. Новосельское
36	Дунав Василий Иванович	1898	5	колхоз им. Щорса с. Новосельское
37	Тодоров Георгий Николаевич	1900	1	колхоз им. Щорса с. Новосельское
38	Капсамун Георгий Константинович	1910	5	колхоз им. Щорса с. Новосельское
39	Жоков Федор Петрович	1922	2	колхоз им. Щорса с. Новосельское
40	Карагяур Иван Григорьевич	1904	6	колхоз им. Щорса с. Новосельское
41	Никифор Антон Георгиевич	1912	4	колхоз им. С. Лазо, с. Орловка
42	Прутяну Лука Федорович	1897	5	колхоз им. С. Лазо, с. Орловка
43	Гончаренко Фома Гнатович	1900	5	колхоз им. С. Лазо, с. Орловка
44	Чолаку Георгий Федорович	1911	4	колхоз им. С. Лазо, с. Орловка
45	Павел Семен Иванович	1903	6	колхоз им. С. Лазо, с. Орловка
46	Тодоров Павел Константинович	1911	2	колхоз им. С. Лазо, с. Орловка
47	Арабаджи Ангел Степанович	1893	5	колхоз им. С. Лазо, с. Орловка
48	Гизело Афанасий Афтентиевич	1913	3	колхоз им. С. Лазо, с. Орловка
49	Дунав Василий Константинович	1901	4	колхоз им. С. Лазо, с. Орловка
50	Стрилучану Георгий Иванович	1892	2	колхоз им. С. Лазо, с. Орловка

51	Кауш Василий Александрович	1918	3	колхоз им. С. Лазо, с. Орловка
52	Попов Степан Федорович	1905	4	колхоз им. С. Лазо, с. Орловка
53	Холостенко Михаил Павлович	1907	1	колхоз им. С. Лазо, с. Орловка
54	Клошка Петр Федорович	1922	2	колхоз им. С. Лазо, с. Орловка
55	Тодоров Николай Константинович	1917	3	колхоз им. С. Лазо, с. Орловка
56	Анохин Федор Александрович	1924	1	колхоз им. С. Лазо, с. Орловка
57	Иванов Петр Григорьевич	1915	3	колхоз им. С. Лазо, с. Орловка
58	Черняну Андрей Пантеевич	1897	1	колхоз им. С. Лазо, с. Орловка
59	Иким Христофор Иванович	1898	1	колхоз им. С. Лазо, с. Орловка
60	Куванжи Афанасий Федорович	1899	3	колхоз им. С. Лазо, с. Орловка
61	Лефатер Василий Иванович	1905	2	колхоз им. С. Лазо, с. Орловка
62	Потырлиу Николай Васильевич	1894	5	колхоз им. С. Лазо, с. Орловка
63	Булат Дмитрий Федорович	1922	1	колхоз им. С. Лазо, с. Орловка
64	Будеску Петр Павлович	1913	4	колхоз им. С. Лазо, с. Орловка
65	Яким Петр Савельевич	1907	7	колхоз им. С. Лазо, с. Орловка
66	Крецу Иван Георгиевич	1912	1	колхоз им. С. Лазо, с. Орловка
67	Белалы Дмитрий Николаевич	1905	3	колхоз им. С. Лазо, с. Орловка
68	Потирлику Илья Васильевич	1905	6	колхоз им. С. Лазо, с. Орловка
69	Шкиопу Афанасий Васильевич	1916	3	колхоз им. С. Лазо, с. Орловка
70	Бабуд Федор Илларионович	1920	1	колхоз им. С. Лазо, с. Орловка
71	Чолаку Александр Федорович	1916	6	колхоз им. С. Лазо, с. Орловка
72	Карачебан Иван Петрович	1917	3	колхоз им. С. Лазо, с. Орловка



73	Поркару Николай Константинович	1924	2	колхоз им. Тимошенко с. Плавни
74	Реуцой Георгий Михайлович	1904	8	колхоз им. Тимошенко с. Плавни
75	Петров Иван Михайлович	1908	1	колхоз с. Нагорное

Rezumat

Pe baza documentelor de arhivă inedite (Ismail, Ucraina), sunt analizate aspecte privind organizarea și relocarea unor părți ale locuitorilor din regiunile Dunării de Jos în Sahalinul de Sud în 1947-1949. În primul rând, relocarea i-a atins pe reprezentanții etniei române care locuiau în raionul Reni. Această relocare ar trebui privită ca o încercare din partea regimului totalitar sovietic de a schimba structura etnică a regiunii, după ce a evacuat partea populației locale în colțuri îndepărtate ale imperiului sovietic, din a doua jumătate a anilor 40 ai secolului al XX-lea. În articol sunt analizate date privind vârsta, apartenența de gen și alți indicatori statistici care reflecta particularitățile populației strămutate în anii 1947-1948.

Cuvinte cheie: Dunărea de Jos, Sahalinul de Sud, strămutare, pescari-fermieri moldoveni.

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Heritage Valuation Driving Sustainability of Cultural Capital in Bishnupur in Eastern India

Asmita BASU, Anupam DE

Abstract

Cultural heritage of a country represents an array of monuments, historic buildings, arts and crafts, indigenous skills and traditions. The emerging threats to the cultural resources by way of decay, loss or destruction, has become a prime concern today. Heritage has become one of the vital components of tourism industry. It is being considered as cultural capital. The process of valuation of this capital is very complex since Heritage is basically a non-marketed good. Different techniques used for valuating environmental resources which are similar in nature to Heritage, have led to the development of economic valuation models especially for valuation of Heritage as cultural assets. This economic approach has helped to derive the real value of heritage sites by way of consumer's surplus and consumer's willingness to pay for the use of cultural heritage assets and sustain sites for future generations.

Key words: Heritage, Economic valuation, Travel Cost Model, Sustainability.

Heritage as a Cultural Asset

A country bears the symbols of its prolific cultural heritage in the form of heritage monuments, historic places, arts and crafts and traditional skills. In general, capital is defined as assets which in combination with other inputs particularly labour transform into other goods, which are then used to generate revenue. The concept of capital has been prevalent in economics since the very beginning. This definition of capital has gradually included the concepts of Human capital and Natural capital. Further extending the concept of capital, the idea of cultural capital has been formulated. It has been observed that both tangible and intangible Heritage has all the characteristics of cultural assets, so it can be regarded as cultural capital¹.

Heritage is in fact regarded as one of the most valuable and fastest growing components of tourism. Conservation of heritage sites is considered to be a vital component of their management since they are irreplaceable resources for the tourism industry. It is noteworthy that cultural resources possess high social values, serve as captivating factor for the visitors as well as stimulate sustainable development across the planet².

¹ David Throsby. "Cultural capital." *Journal of cultural economics* 23, no. 1 (1999): 3-12.

² Vinita Deodhar. "Does the Housing Market Value Heritage? Some Empirical Evidence". No. 0403 (Research Paper: Macquarie University, 2004).



In the process of urban planning and management, the issues pertaining to conservation of heritage sites have been mostly ignored by the planners. Due to this fact, the heritage sites and monuments have been put through decay and destruction and eventually led to the loss of cultural capital. Owing to the threats of permanently losing the cultural heritage of the nations, urban planners are now more concerned about preservation and conservation of tangible and intangible heritage³.

Heritage can be treated as a non-marketed good. Since heritage is being treated as an alternate form of capital, it is important to understand its possible contributions to economic output leading to the growth of the economy. The greatest challenge of economic valuation of cultural heritage lies in the methods to be applied. In general, valuation techniques are mostly implemented for environmental resources. During recent periods, much research concerning cultural capital and assets has been conducted which has revealed the similarity with the environmental resources, particularly since these do not have proper market to evaluate their economic prices either. It has also been discerned that the cultural heritage assets belong to the category of public goods⁴. Therefore, appropriate valuation techniques should be applied to evaluate the heritage sites and understand the demand for the sites among the various stakeholders such as the residents, tourists and others.

Valuation of Heritage

Different researches have suggested a number of methods to evaluate heritage sites economically, considering them as cultural assets. Many scholars have tried to focus on how to deal with the valuation of the cultural heritage in the form of cultural assets of a particular community, region or the nation as a whole. The valuation techniques which are applied for environmental resources have been modified and used for economic valuation of non-marketed goods such as cultural heritage assets. One such type of non-marketed valuation techniques is known as Travel Cost Method (TCM). According to this model, a visitor is considered to choose one or more heritage sites depending on site qualities while the rate of visit to the site is based mainly on the relative travel costs from home to the respective heritage site⁵.

³ Mousumi Dutta, Sarmila Banerjee, and Zakir Husain. "Untapped demand for heritage: A contingent valuation study of Prinsep Ghat, Calcutta." *Tourism Management* 28, no. 1 (2007): 83-95.

⁴ Andrea Báez-Montenegro, Ana María Bedate, Luis César Herrero, and Jose Ángel Sanz. "Inhabitants' willingness to pay for cultural heritage: a case study in Valdivia, Chile, using contingent valuation." *Journal of Applied Economic* 15, no. 2 (2012): 235-258.

⁵ Sukanya Das. "Travel cost method for environmental valuation." (*Dissemination Paper* 23, Center of Excellence in Environmental Economics, Madras School of Economics, 2013).

Harold Hotelling gave the first notion under the Travel Cost Method (TCM), where he suggested that a model for evaluating the re-creation value of a site could be developed based on the visitors' expenditures for visiting the site⁶. The initial model was further developed by Clawson (1959)⁷ and Clawson and Knetsch (1966)⁸. TCM is a questionnaire method used to conduct survey involving samples of visitors to the sites to determine their location, the necessary demographic and attitudinal data, number of visits to the site and other sites being considered, and information about the trip, such as purpose, length and costs. From these statistics, the cost of visits may be estimated and linked to the frequency of visits and other important characteristics to construct a connection of demand. In the most elementary scenario, this demand function may be used to determine the recreational value of the entire site, while more complex research can seek to build demand equations for particular recreation site's features and values evaluated for these unique elements.

Heritage sites of Bishnupur

Bishnupur, the historical capital of the Malla Dynasty (16th century A.D.), is a small temple town in Bankura District of West Bengal. Tourists mainly visit this place for weekend getaways from the hustle and bustle of the city. This small town is surrounded by a number of heritage monuments. Historians believe that there were around thousands of religious places in Bishnupur and its adjoining areas. The majority of the heritage monuments are protected neither by the state nor by the central authorities. They are maintained by private bodies. The Archaeological Survey of India (ASI) has protected the three major historic heritage sites in Bishnupur namely the Rasa-mancha, Shyam Rai temple and the Jor Bangla temple. The cultural, social, architectural and historic values of the heritage sites of Bishnupur make them worthy of being designated as World Heritage Sites, however they are now on the tentative list of World Heritage Sites⁹.

⁶ Harold Hotelling. "The Economics of Public Recreation: The Prewitt Report." *National Parks Service* (Washington D.C.: 1947).

⁷ Marion Clawson. *Methods of Measuring the Demand for and Value of Outdoor Recreation, Reprint*, no. 10 (Washington D.C: Resources for the Future Inc, 1959).

⁸ Marion Clawson, and Jack L. Knetsch. *Economics of outdoor recreation* (Washington D.C.: RFF Press, 2011).

⁹ Basu, Asmita. "Contexts and Concerns for Sustainability of Cultural Heritage Sites of Bishnupur." *PLURAL. History, Culture, Society VII*, no.1 (2020): 120-130.



Fig. 1. Rasa-mancha

Rasa-mancha: the Rasa-mancha (Fig.1) depicts a stage or a mancha which was constructed by King Bir Hambir in AD 1600¹⁰. This monumental structure was built for the purpose of carrying out rituals and festival celebration particularly during the Rasa festival. Tourists have shown keen interest in visiting this heritage site for its aesthetic value, unique architectural construction with arched galleries, pyramidal elevation, domed roof circumscribing a small shrine area located in the centre of the structure¹¹.

Shyam Rai temple: another heritage gem visited commonly by the tourists is the Shyam Rai temple (Fig.2). This magnificent temple is mostly distinguished by its Pancha-ratna or the five towers. Intricate terracotta panels depicting scenes from mythological stories of Ramayana and Krishnalila, adorn the main façade. Historical records affirm that this structural marvel was constructed by King Raghunatha Singha in the year 1643¹².

¹⁰ Sachindra S Biswas. *Bishnupur*, (Director General, Archaeological Survey of India: Delhi, 1992): 10.

¹¹ Sujay Kumar Mandal, Tanaya Mukherjee, and Bidhan Mondal. "The Traditional Terracotta Temple Architecture of the Temple Town Bishnupur: A Study on Structure, Style, Themes and Motifs of Ornamentation." *International Journal of Liberal Arts and Social Science* 4, no. 1 (2016): 13.

¹² Biswas. *Bishnupur...*, 20-24.

Jor Bangla Temple: this twin hut styled temple (Fig3) is a part of the Bishnupur group of temples (as regarded by ASI) which creates a unique attraction for the tourists. Its walls are beautifully ornated with terracotta plaques. It is regarded to be one of the best carved temples which make the historic heritage of Bishnupur prominent in front of all¹³. The Jor Bangla temple was erected by the Malla rulers in AD 1734-35 representing a distinct Bengal style of architecture¹⁴.

The theoretical development of Travel Cost Model

The general model gauges the recreational value generated for a specific site by establishing a relationship between the demand for that site (estimated through number of visits to the site) and price (estimated through the costs incurred for a visit). A simple TCM model can be defined by a 'trip-generation function' (tgf) such as;

$$V = f(C, X) \dots \dots \dots (1)$$

where, V = Number of visits to a site

C = Visit costs (mainly the travel cost)

X = Additional socio-economic factors accounting for the variance of V¹⁵.

The Travel Cost Model has two categories - namely the Individual Travel Cost Method and the Zonal Travel Cost Method based on the dependent variable which in this case is V. Individual Travel Cost Method, one of the variants of TCM elucidate the definition of dependent variable as individual frequency of the visit to the site during a specified period. The other variant, Zonal Travel Cost Method (ZTCM) at the outset segregates the entire region into zones demarcated by the visitors' origin and then considers the visit rate as the dependent variable. The visit rate is defined as the frequency of zonal visits during a specified period divided by the total population of the identified zone.

The trip generating function can therefore be modified as per the ZTCM technique:

$$V_{zs} / N_z = f(C_z, X_z) \dots \dots \dots (2)$$

where, V_{zs} = Visits from zone z to site s

N_z = Population of zone z

¹³ "Bankura," Monuments, ASI Kolkata Circle, <http://www.asikolkata.in/bankura.aspx> (accessed: 10.04.2021).

¹⁴ Biswas. *Bishnupur...*, 15.

¹⁵ Das. "Travel cost method..."



C_z = Visit costs from zone z to site s

X_z = Socioeconomic explanatory variables in zone z

The visitor rate, V_{zs} / N_z , is often calculated as visits per 1,000 population in zone z .

Application of Zonal Travel Cost Method for Valuation of Bishnupur Heritage Sites

In the present study, the Zonal Travel Cost Method (ZTCM) is applied to the heritage sites of Bishnupur. The first step of the Zonal Travel Cost Method consisted of a survey in order to understand the visit rate in Bishnupur and to identify the zones from which the visitors had travelled frequently as well. A convenience sampling method was used to collect a sample of 310 respondents out of which 300 relevant responses were obtained. It was observed that the geographical locations of the respondents pointed out nine major districts from where the visitors had travelled to see the heritage sites of Bishnupur. In this method, identification of the zones plays an important role. The nine districts (Listed in Table 1) have been thus considered as the nine distinct zones for the purpose of applying the ZTC method.



Fig 2. Shyamrai Temple

Visit Rate Calculation:

The data collected through the survey was used to calculate the Visit Rate. This rate was calculated in relation to the number of inhabitants of the districts (data obtained from Census 2011) from where the tourists had visited Bishnupur firstly. The visit rate per capita was calculated and then the visit rate per 10,000 inhabitants was calculated to standardize the rate as shown in Table 1.

Table 1. Visit Rate Calculation

Location	Population (as per Census 2011)	Number of visitors	Visit rate per capita	Visit rate per 10,000 inhabitants (Y range)
Bankura	1,37,386	120	0.000873	8.734514
Midnapore	1,69,264	20	0.000118	1.181586
Bardhaman	3,14,265	15	0.000048	0.477304
Howrah	10,77,075	10	0.000009	0.092844
North 24 Parganas (Dumdum)	1,15,000	5	0.000043	0.434783
Kolkata	1,40,35,959	105	0.000007	0.074808
Hooghly (Haripal)	2,61,073	10	0.000038	0.383035
Haldia	20,01,000	5	0.000002	0.024988
South 24 Parganas (Rajpur-Sonarapur)	424368	5	0.000012	0.117822
Coochbehar	77,935	5	0.000064	0.641560

Zonal Travel Cost Calculation:

The second step focuses on calculating the travel cost from these nine zones with the help of Zonal Travel Cost Method (ZTCM). The Zonal Travel Cost Method, as suggested by Bedate,¹⁶ is as follows:

$$\text{Cost of travel} = \frac{\text{Distance in km} \times 2 \times 24}{(\text{Number of vehicle occupants}) \times (\text{length of trip in days})}$$

From the survey it was evident that most of the tourists travelled by land since they were the residents of the neighbouring districts. In order to calculate the cost of travel, it was important to identify the distance travelled by land. The cost per kilometer was Rs. 24, since this is the amount of travel allowance

¹⁶ Ana Bedate, Luis César Herrero, and José Ángel Sanz. "Economic valuation of the cultural heritage: application to four case studies in Spain." *Journal of cultural heritage* 5, no. 1 (2004): 101-111.



given by 7CPC of Govt. of India. This figure includes fuel costs, vehicle maintenance and depreciation, insurance, taxes, and other expenses. As opined by Bedate, to calculate the cost of travel, the formula should take into consideration the round-trip cost, the duration of the trip and, whether the trip is made in a personal vehicle, and the number of vehicle occupants as well. Along with the above-mentioned information regarding travel cost, the entry fee per person to the heritage sites were also considered. The entry fee to the three heritage sites in Bishnupur, namely-Shyamrai temple, Jor Bangla temple and Rasamancha is administered by ASI.

Table 2. Calculation of Zonal Travel Cost

Location	Distance from Bishnupur (Kms)	Length of trip (in days)	No. of vehicle occupants	Cost of travel per person + entry fee** (Rs.)
Bankura	38	1	24	96
Mednipore	75	1	10	380
Bardhaman	82	2	4	512
Howrah	134	2	4	824
N24 Prg	135	2	4	830
Kolkata	140	2	4	860
Hooghly	168	2	4	1028
Haldia	192	2	4	1172
S24 Prg	200	2	4	1220

*During the survey, the 9th district, from where very few tourists had come, was Cooch-behar. Since this district is 673 km away from Bishnupur, tourists did not prefer bus or car for the purpose of travel. So, this district has been considered as an outlier data point and has not been considered during the analysis.

** Entry fee for Indian tourists is Rs. 20 (by ASI).

The data obtained from Table 1 was further analyzed with the help of statistical tool. Firstly, the correlation coefficient was obtained, in order to understand whether there is any correlation between the obtained variables.

Table 3. Correlation Matrix

	Visit rate	Travel cost
Visit rate	1	
Travel cost	-0.7408	1

The Correlation matrix in table indicates that the correlation coefficient is -0.74. It means that the Visit rate and travel cost are negatively correlated.

Further, the data were analyzed with the help of SPSS software which resulted in $R^2 = 0.552$ and Adjusted $R^2 = 0.488$ (Table 4). This indicates that the linear regression explains 55.2% of the variance in the data.

Table 4. Model Summary in SPSS

Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.743 ^a	.552	.488	2.0168449
a. Predictors: (Constant), Travel cost				

Further, Table 5 establishes the Regression coefficients. The ANOVA table (Table 6) is constructed which shows values for F-test. In the case of linear regression, F-test assumes the null hypothesis that there is no linear relationship between the two variables (which is denoted by $R^2=0$). From the present analysis, it is observed that $F = 8.618$ with 8 degrees of freedom. From the SPSS ANOVA table p value = 0.022, as we can see, $p < 0.05$ and hence, it is significant.

Table 5. Regression Analysis in SPSS

Coefficients								
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	95.0% Confidence Interval for B	
		B	Std. Error	Beta			Lower Bound	Upper Bound
1	(Constant)	5.587	1.614		3.462	.011	1.771	9.402
	Travel cost	-.006	.002	-.743	-2.936	.022	-.010	-.001
a. Dependent Variable: Visit rate per 10,000 inhabitants								

Table 6. ANOVA in SPSS

ANOVA						
	Model	Sum of Squares	df	Mean Square	F	Sig.
1	Regression	35.057	1	35.057	8.618	.022 ^b
	Residual	28.474	7	4.068		
	Total	63.530	8			
a. Dependent Variable: Visit rate per 10,000 inhabitants						
b. Predictors: (Constant), Travel cost						



Fig. 3. Jor Bangla Temple

Thus, a liner relationship is established between the Visit rate and the Travel cost incurred to visit the heritage sites, from the various analytical studies. It is essential to understand this factor, since on the basis of this relationship, the demand function can be established. The demand function can be expressed through the equation $y = 5.5866 - 0.0056x$. It implies that an additional **5.5866** travel cost would decrease the visit rate to the heritage site by **0.0056**. The travel cost may therefore be treated as important factor to understand the demand for the heritage sites in Bishnupur. This factor would also help us in establishing the consumer's willingness to pay and consumer surplus in the next phase of the study.

Analysis and Observations

The present study analyses how the demand for the heritage site would be changing with respect to the travel cost. We have seen that the entry fee for the three sites, as imposed by ASI, is very low. So, the majority of the rev-

enue generated from the entry fee is utilised for the basic maintenance purpose of the sites. In order to bring in sustainability of these heritage sites, to develop site museums, light and sound programmes, awareness campaigns and various similar programmes and infrastructures, a regular source of funds would be required. The ZTC Model used in this study comes into play at this point. This model can be utilitarian in forecasting the additional revenue generation by estimating the consumer's surplus and consumer's willingness to pay.

Determination of Consumer's Surplus:

The demand equation $y = 5.5866 - 0.0056x$ can be used to identify the consumer surplus by estimating the number of visits on the basis of the additional cost that the visitors would be willing to pay to visit the heritage sites of Bishnupur apart from the Travel cost calculated earlier (Table 2). At the calculated travel cost, the total no of visits from different zones was 295. On the basis of the demand equation formed from the previous data, a final demand curve can be established through linear interpolation on the line constructed by the points forming the basic demand curve, which depicts the variation in the total number of visits as the travel cost increases. It was observed that the number of visits decreased on increasing the additional travel cost beyond Rs. 150. The variation in the number of visits with the increase of additional cost has been graphically represented through the demand curve for the heritage sites of Bishnupur in Fig. 4.

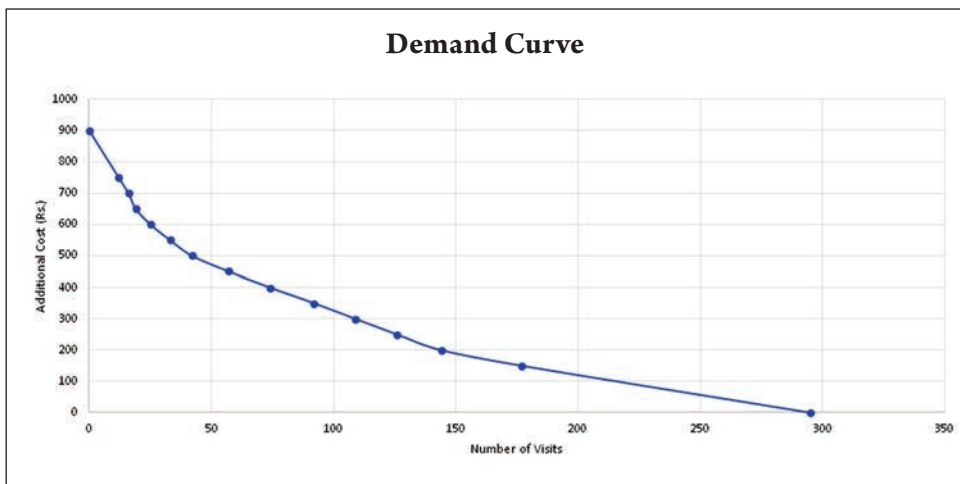


Figure 4. Demand curve for Heritage sites of Bishnupur



Thus, the area under the curve (Fig.4) gives the total consumer surplus for all the nine zones. So, after calculating the area under the curve we observe that consumer surplus equals **Rs.78,050**. Thus, the consumer's willingness to pay can be inferred to be **Rs. 265** per person, since the number of visitors surveyed for this study was 295.

The data obtained from Archaeological Survey of India (ASI), mention that the number of Indian and foreign visitors was 1,55,521 for the year 2019-20. Therefore, the total annual consumer surplus can be estimated by using this model. This serves as the regular source of funds which could be used to sustain the heritage sites as well as induce socio-economic growth of the region.

Conclusion

The real challenge lies in the economic valuation of cultural capital due to the non- existence of markets to reflect the real value of the heritages in terms of economic prices. It is observed that the problem of valuation persists even though the visitors express a willingness to pay for the heritage which has a societal value along with signs of cultural identity. Thus, it is really important that alternate methods are applied to realize the preferences of significant stakeholders of cultural capital through methods like that of the Travel Cost Model. The relevance of this method lies in estimating the visitor's willingness to pay for the consumption of the cultural heritage assets which is measured in terms of economic pursuits associated with travelling to the heritage sites. This study also entails various policy and decision-making processes regarding the economic sustainability of the heritage sites. If applied to rich cultural heritage sites, the Zonal Travel Cost Model can forecast the amount of surplus funds that can be generated through consumer's surplus. This economic approach will also be beneficial for all the policy makers and future investors and, in its turn, it will lead to the overall economic development and sustainability of the heritage sites and their adjoining areas.

Rezumat

Patrimoniul cultural al unei țări este reprezentat de o serie de monumente, clădiri istorice, creații artistice, meșteșuguri, abilități și tradiții indigene. Amenințările curente asupra resurselor culturale prin deteriorare, pierdere sau distrugere, au devenit astăzi o preocupare principală. Patrimoniul a devenit una dintre componentele vitale ale industriei turismului. Procesul de evaluare a acestui capital cultural este foarte complex deoarece patrimoniul este în esență un bun necomercializat. Diferitele tehnici utilizate pentru evaluarea resurselor de mediu, care sunt similare cu cele de patrimoniu, au

condus la dezvoltarea de modele de evaluare economică, în special pentru evaluarea bunurilor culturale. Această abordare economică a contribuit la obținerea valorii reale a moștenirii prin surplusul consumatorului și disponibilitatea consumatorilor de a plăti pentru utilizarea bunurilor de patrimoniu cultural și de a susține siturile pentru generațiile viitoare.

Cuvinte cheie: moștenire valoarea economică, model de costuri, sustenabilitate

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Recreational Centers in Chisinau in the Vision of Visual Artists

Natalia PROCOP

Abstract

One of the genres of easel painting that remains less pretentious to politics is landscape. The city of Chisinau, one of the most important cities of the Republic, was and remains a source of inspiration for artists Eugenia Gamburd, Rostislav Ocușco, Mihail Petric, Filimon Hămuraru, Ludmila Țonceva, Vasile Toma, Inesa Țîpina, Petru Jireghea, Ion Jumatii, Ion Chitoroagă, Florentin Leancă and others. That is one of the topics addressed by artists reflecting moments of relaxation, rest, sports - recreational centres (parks, lakes, stadiums etc.). This article analyzes the paintings from the collection of the National Museum of Art of Moldova, but also the private collections of plastic artists concerning the rest areas of Chisinau. These paintings made on the subject under research can be attributed not only to the landscape genre but also, in some cases, to genre painting. The subject becomes current for painters with the arrangement of the capital's parks: The square of the Ensemble of the Metropolitan Cathedral of Chisinau, the Public Garden of Chisinau, the Botanical Garden, the Valley of Roses park, the Valley of Mills park, the Ghidighici Reservoir, the Dinamo Stadium etc.

Keywords: Chisinau, recreational centres, visual arts, painting.

The relaxation area of the urban spaces is the subject of inspiration for visual artists from different periods. Public parks, sports grounds or children's playgrounds are subjects without ideological claims, which are meant to bring the spectator back to the area of relaxation and comfort.

This study analyzes the works of art from the properties of the National Museum of Art of Moldova (NMAM) that address the theme of recreational centres in Chisinau, starting with the first acquisitions in 1946, paintings dating from 1895 to the 21st century. The subject is evoked in the paintings of Rostislav Ocușco, Mihail Petric, Filimon Hămuraru, Ludmila Țonceva, Vasile Toma, Inesa Țîpina, Petru Jireghea, Ion Jumatii, Ion Chitoroagă, Florentin Leancă and others. The cycles of works from the personal collections of the visual artists who approached the respective subject were also subjected to the analysis.

The artistic creation presented in this study demonstrates the evolution of the city from a quiet, green area, where life flows slowly, with values for family, physical and spiritual health, traditional values for those times, evolving to the rapid urbanization of the city, building constructions in the park, arranged sta-

diums, the multitude of children's cradles. All these changes could be achieved with the economic development of the union republics. The evolution of Chisinau and the people of Chisinau can be seen not only in the clothing of the time, the scenery of the landscape, the architecture adjacent to the recreational areas, but also through the approach technique and the style of the artists.

The scientific problem solved in the article is the definition of the role of painting with the theme of recreational areas in Chisinau in the context of the landscape genre in Moldova, which made possible the presentation of its evolutionary process. The objectives of this article are: the capitalize on the documentary sources concerning the studied topic present in the Republic's archives and libraries; the identification of the methodological-technological specificity in the practical realization of the works of the local painters who made the theme of the leisure areas; the cataloging the names of the artists in the field of painting and of the most important creations from the NMAM plastic fund to the targeted theme.

The subject of recreational areas in Chisinau is a subject that has not been researched. Landscape as a genre of fine arts was studied in the doctoral thesis „Landscape in fine arts in Moldova”, author Angela Munteanu. In classifying the types of landscape „according to the nature of the images”, the author lists only the urban landscape¹, without detailing its specificity.

In the article „Urban landscape in the painting of Moldova in the twentieth century - early twenty-first century” Ludmila Toma highlights the specific trends of paintings with the theme of the urban landscape (representing the cities of Chisinau, Balti, Paris etc.), made by local artists².

The lack of field research impelled the need for this study, the realization of which was possible based on the plastic funds of MNAM and the National Archive of the Republic of Moldova.

Painting from the modern period, the 1900s from NMAM properties presents Chisinau as a village, with courtyard houses. The visual artists who approached the theme of Chisinau from that period are Vladimir Ocuşco, Theodor KiriacoŃ, Vasile Blinov, Saul Rabover and others. The first works from the plastic fund of NMAM in the 19th century subjected to research are characterized by landscapes of a realistic aesthetic ideology (Figure 1, 2). Ivan Stepankovski is a visual artist who painted the park in Chisinau, a work that can be attributed not only to the landscape genre but also to the genre painting. The

¹ Urban, with variants of architectural or industrial landscape, working, Munteanu Angela. *Peisajul în artele plastice din Moldova* (Chişinău, 2016): 36.

² Toma Ludmila. „Peisajul urban în pictura Moldovei din secolul al XX-lea – începutul secolului al XXI-lea.” *Arta* (2017): 113-119.



composition “Walk (In the Public Garden of Chisinau)” (1895, oil, canvas, 400 × 320 mm, NMAM) is the first dating of the Chisinau city in the painting from the museums’ properties. The author I. Stepankovski recounts the historical period in which the action takes place, indicated by the wooden fence landscape³, but also by the vintage clothing.

Emphasizing the same subject, although with a different panorama, is the painting of N. Ratok “Entrance to the park in Chisinau” (1908, oil, canvas, 230 × 350 mm, NMAM), the fence that delimits the park, being similar to the current one. The authors, using the volumetric spatial treatment, the falling shadow and light, the elements of the landscape specific to the period, manage to reproduce the atmosphere of time, the state of the day etc.

The post-war period in painting is characterized by the subject of recreational centres that develop with the urbanization of Chisinau, landscaping of parks, accumulation lakes, such as Chisinau Public Garden, Valley of Mills, Valley of Roses, Ghidighici Lake, Botanical Garden etc. All these places are points of attraction for both the inhabitants of the capital, the visitors and the visual artists.

The first decade of the post-war period largely reflects the city destroyed during the bombings. One of the artists to whom she managed to present the sunny capital, ignoring the tendency of the socialist spirit manifested at that time, is Eugenia Gamburd. During the years 1930–1934 she studied at the painting department of the School of Fine Arts in Chisinau⁴, and during the years 1934–1936, she continued her studies at the Academy of Arts in Bucharest⁵. In 1940 the artist returned to the country, and after the Second World War, she showed her interest in the following subjects: “Reconstruction of Chisinau” (1947) and “Chisinau under construction” (1947–1948). Gamburd is concerned with changing the appearance of the city, depending on the state of the day, mainly focusing on the falling shadows, the intensity of sunlight, etc. In the NMAM collection, there are a series of landscapes of the artist that denotes a state of relaxation, in which people are represented resting “The Square” (1945, 192 × 267 mm), “Al. Pushkin park from Chisinau” (1945, 285 × 388 mm).

³ The public garden was founded in 1820 by the architect Bogdan Eitner, surrounded by a wooden fence, A.S. Weinberg. *Chişinăul în trecut şi prezent*. Schiţă istorică (Chişinău, 1936): 23.

⁴ Professor Şneer Kogan, Ludmila Toma. *Eugenia Gamburd* (Israel: Zvi Printing Corporation, 2007): 129.

⁵ Jean Alexandru Steriadi’s studio, Toma. *Eugenia Gamburd...*, 129.



Figure 1. Ivan Stepankovski “Walk (In the Public Garden of Chisinau)”, 1895 (oil, canvas, 400 × 320 mm, NMAM).

In 1947, E. Gamburd painted the work from the cycle “Restoration of Chisinau” – “View from the Cathedral Park” (gouache, cardboard, 523 × 656 mm, NMAM). The dynamics generated by urban transport (tram) and pedestrians in the foreground is balanced by the statics and grandeur of the Cathedral and the Belfry in the background that appears between the trees. The panoramic view is a day of sunny Chisinau, still under reconstruction. Eugenia Gamburd’s composition is full of optimism, the author resorting to contrast colours.

Eugenia Gamburd’s works have not only artistic but also historical value, the author evoking the period after the Second World War. Unfortunately, none of the author’s canvases on this subject were purchased by the Ministry of Culture. Only on the occasion of the 90th anniversary of the painter’s birth, some of the artist’s paintings were transmitted from the collection of the National Archive of the Republic of Moldova and the daughter’s collection in the NMAM funds⁶.

⁶ “Restoration of Chisinau” (1947-1949) street Pushkin; “Restoration of Chisinau” (1947-1949) building a department store, The National Archive of the Republic of Moldova, F3170, inv. 2, d. 52, d. 53: f. 1.

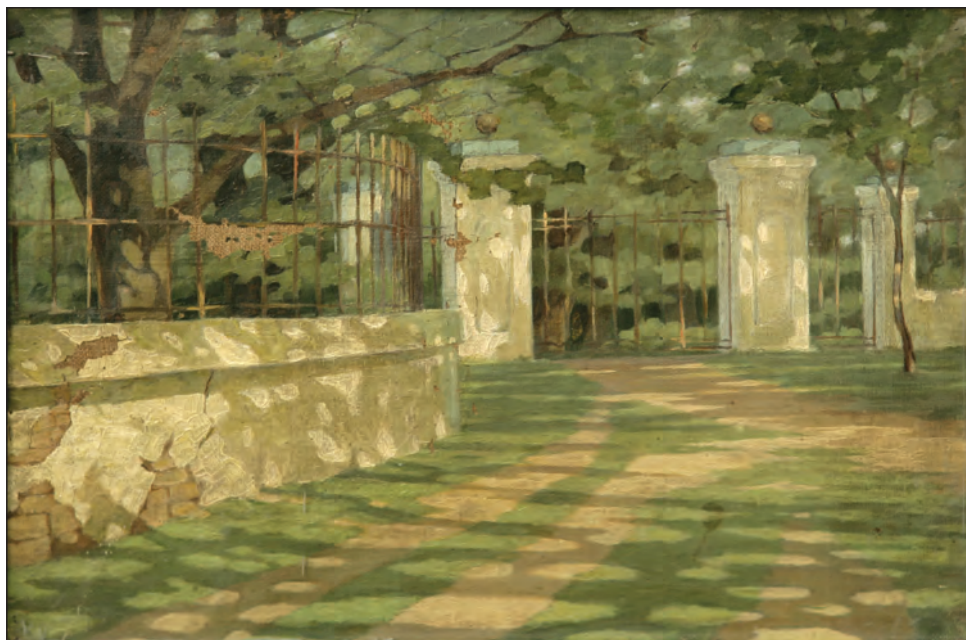


Figure 2. N. Ratok "Entrance to the park in Chisinau", 1908 (oil, canvas, 230 × 350 mm, NMAM)

The NMAM funds preserve numerous works with the evocation of the theme of the city from the creation of Mihail Petric, considered "master of the lyrical-panoramic landscape"⁷, also called "poet of harmonies"⁸. Specific to the author's landscapes are the panoramic, realistic, meticulously processed compositions with a rich chromatic spectrum. The image reproduced in the painting "Winter in Chisinau" (1963, oil, canvas, 600 × 1200 mm, NMAM) approaches the current appearance of the square of the Metropolitan Cathedral of Chisinau. The peace that the canvas emanates is suggested not only by the winter season but also by the image of the mother holding her child by the hand, representing everyday life, the continuity of the nation etc.

Valley of Mills Lakes, Ghidighici, Valley of Roses, were used to be training areas for young athletes, or for children who actively spend their free time, often becoming subjects for painting.

A sequence of the Komsomol Lake, currently the Valley of Mills, and the surrounding landscape can be found in the work "Study. Chisinau, Komsomol Lake" (1957, oil, prime textured cardboard, 124 × 168 mm, NMAM)

⁷ Ciobanu Constantin. „Un mare peisagist al timpurilor noastre.” *Akademios* nr. 4/35, (2014): 160.

⁸ Leonora Sădnic. *Mihail Petric. Biobibliografie* (Chișinău: Biblioteca Națională a Republicii Moldova, 2016): 29.



Figure 3. Gheorghe Munteanu "Valley of Mills", 1984 (oil, canvas, 1060×1220 mm).

signed by Rostislav Ocușco. Moreover, Mihail Petric has a panoramic approach in the painting "Komsomolist Lake" (1965, oil, canvas, 600 × 1505 mm, NMAM), presenting the lake and the surrounding district. The motif of the recreational area, created by the artist M. Petric, continued even later. Thus, in the work, "September" (1975, oil, canvas, 850 × 700 mm, NMAM) the lake, the surrounding vegetation, but also the city with many blocks that disappear in the distance are painted. The lake is so small that it seems to be dominated by the surrounding vegetation and the industrial area. Thus M. Petric presents the contrast between the creation of nature, with its and of man's peace, with its interventions. In all Mihail Petric's works, the love for the surrounding nature and the care for its preservation are observed.

"In the Valley of Mills" (1973, oil, canvas, 550 × 575 mm, NMAM), the author Filimon Hămuraru represents a festive event, with the participation of a wide audience. Also, Gheorghe Munteanu dedicated numerous canvases to Valley of Mills Park. The artist in the work "Valley of Mills from Chisinau" (1972, 600 × 850 mm, oil, canvas) managed to render the picturesque and peaceful



Figure 4. Ion Jumatii “Komsomolist Lake”, the 90s (oil, canvas, 1100 × 1940 mm, MNAM).

atmosphere decoratively, with a combination of vivid, contrast colours, a theme he returns to in the next decade in “Valley of Mills” (1984, oil, canvas, 1060 × 1220 mm). A graphic approach can be found in the painting “At Valley of Mills” (2012, oil, canvas, 1440 × 790 mm) in which the author presents the park from another perspective, with the staircase, the fountain and the lampposts, the alley and the lake in the silence of the evening, at sunset.

Numerous visitors walking with their families and athletes training on sailing boats are represented in the painting “Komsomolist Lake” by Ion Jumatii (the 90s, oil, canvas, 1100 × 1940 mm, NMAM). “Alley at Komsomolist Lake” (the 1990s, oil, cardboard, 965 × 790 mm, NMAM) signed by Ion Chitoroaga presents the alley with young poplars, the author solving his problem of falling shadows. The work differs by the dynamics suggested by the alley in perspective and the shadows of the trees planted on its edges.

In an impressionistic manner with a small range of colours, with multiple shades of grey, Florentin Leancă proposes the solution in the work “Lake Valley of Mills” (2012, oil, canvas, 350 × 450 mm). The composition reproduces the solitary motorboat and the reeds that we do not find in the paintings of previous decades by other artists.

Veaceslav Ignatenco⁹ dedicated a large part of his creation to Chisinau. The author tries to immortalize the old part of Chisinau, with its narrow

⁹ A graduate of the Minsk Academy of Fine Arts (1983), Procop Natalia. „Bisericile în plan triconc din Chişinău în viziunea artiştilor plastici.” *Dialogica. Revistă de studii culturale și literatură* nr. 3, (2020): 122.

streets, yards and low courtyard houses, transmitting the calm and picturesque rural atmosphere of the city centre. V. Ignatenco also worked on the subject of urban parks. Valley of Mills is an especially attractive area to the artist. The paintings “Chisinau. Spring. Looking at Valley of Mills Lake” (2014, oil, canvas, 500 × 600 mm), Chisinau. Rotunda. Above the Valley of Mills lake” (2017, oil, canvas, 500 × 700 mm) etc. they differ in the rendering of the state of the day and composition, one of the main features being the dominance of silence. “Chisinau. Spring. Looking at Valley of Mills Lake” is a work that presents the revival of nature, the park being permeated by peace and innocence, and in the distance, you can see the city, the author having mastery in rendering planes. It is a work through which the artist manages to bring back the state of the moment, the atmosphere. “In Chisinau. Rotunda. Above the Valley of Mills lake” V. Ignatenco enlivens the Rotunda and the area nearby, presenting the landscape on a summer day.

Another season evoked by the author is autumn¹⁰. An author’s painting, with a panoramic view, is “Ghidighici Reservoir” (1971, oil, canvas, 800 × 1500 mm, NMAM), which is characterized by the presence of the rich autumn colour, specific to the Moldavian space. Unlike the other works dedicated to Chisinau, we see the composition developed diagonally here, in which the contrasting vegetation in the foreground balances with the waters of the Ghidighici reservoir¹¹.

Ghidighici Lake was also painted by Gheorghe Munteanu. The author attracts the attention of spectators by rendering the active spirit of yesterday’s society “World Canoe Competition in Ghidighici” (1985, oil, canvas, 1510 × 1450 mm).

“Quiet. Autumn in the Valley of Roses” (1987, oil, canvas, 800 × 1200 mm, NMAM) by M. Petric is a work that inspires a state of rest, of a sad day at the beginning of autumn. The silence in the heart of nature is interrupted by the multi-storey blocks in the background, represented schematically.

A special painting by V. Brâncoveanu from his private collection is “In the Valley of Roses” (1980, oil, canvas, 95 × 120 mm). The work is distinguished by a decorative approach to shapes and a contrasting colour range. V. Brâncov-

¹⁰ As M. Petric himself states “I am in love with the Moldavian spring and autumn – these are the seasons of my paintings, seasons that round up rebirth and fulfilment”, Sâdnic. *Mihail Petric...*, 35.

¹¹ Water in Romanian mythology is the “eternal source of life”, Antonescu Romulus, *Dicționar de simboluri și credințe tradiționale românești*, 2016. <http://cimec.ro/Etnografie/Antonescu-dictionar/Antonescu-Romulus-Dictionar-Simboluri-Credinte-Traditionale-Romanesti.pdf> [accessed 15.08.2020].



Figure 5. Mihail Petric "Ghidighici Reservoir" 1971 (oil, canvas, 800 × 1500 mm, NMAM).

eanu painted the moment of gathering the rose petals, a current activity during the Soviet period. It is a dynamic composition suggested by hills and workers placed in rows. Through composition and decorative, the artist approaches the works from the decorative tint period of the peysagist Eleonora Romanescu. In her paintings, V. Brâncoveanu is distinguished by his chromatic and compositional mastery, by his love for his hometown – Chisinau.

"At the spring. Beach" (1987, oil, canvas, 550 × 750 mm, NMAM), author Petru Jireghea presents Chisinau residents and guests of the capital resting at the beach. In the distance, you can see an old district, with courtyard houses, and two-storey buildings in the background.

The interaction of the old and the new Chisinau was also a topic addressed by Ludmila Țonceva. The lake often interacts with new constructions, thus immortalizing the capital's architectural changes. "Houses above the lake" (1981, oil, lake, canvas, 1320 × 870 mm, NMAM) is one of the few compositions in which the author painted the multi-storey buildings. The silence near the lake in the foreground is contrasted with the representations of distant neighbourhoods, with construction sites. The work is made with the predominance of the warm range with multiple shades of pink, ochre.

Another work "Urban landscape. Evening" (1984, oil, 810 × 810 mm canvas, NMAM) by the same author represents the city's old part with a relaxation area near a lake with surrounding trees, which contrasts with the huge multi-storey buildings in the back. The painting is made in a cold range of colours with a predominance of shades of blue.

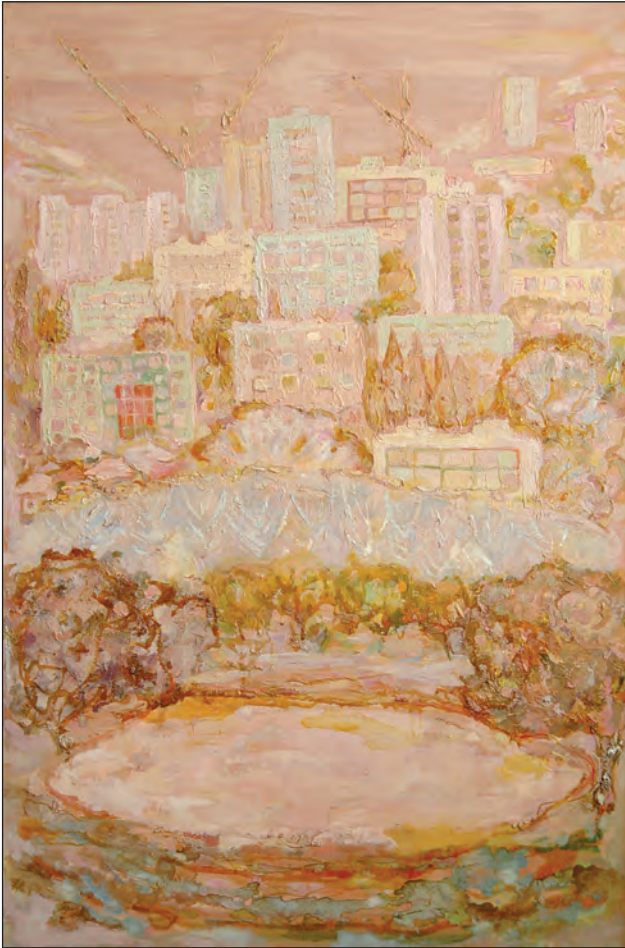


Figure 6. Ludmila Țonceva "Houses above the lake", 1981 (oil, lake, canvas, 1320 × 870 mm, NMAM).

Ludmila Țonceva realizes a series of works in Plein-air (open-air) at the Botanical Garden: "The ark of roses. Botanical Garden" (1988), "Stars in the Botanical Garden" (1997), "Autumn Flowers. Botanical Garden" (1998). All these paintings have open and dynamic compositions, characterized by intense chromatic and contrasting tones. Being a good connoisseur of art theory and history, L. Țonceva advocated for complex compositions, a wide range of colours, always keeping the individuality that consecrated her.

Botanical Garden was also a source of inspiration for Valentina Brâncoveanu: "In Botanical Garden" (1985, oil, 605 × 800 mm canvas), "In Botanical Garden" (1986, oil, canvas, cardboard, 500 × 700 mm), "Autumn in Botanical Garden" (1987, oil, canvas, 450 × 550 mm), "In Botanical Garden" (1998, oil, 245 × 350 canvas), "In Botanical Garden" (1998, oil, 265 × 345 canvas) etc. The artist painted a panoramic landscape with flower fields during the summer period "In Bo-



Figure 7. Valentina Brâncoveanu “In the Valley of Roses”, 1980 (oil, canvas, 95 × 120 mm).

tanical Garden” (1986), “In Botanical Garden” (1998), or presenting the beauty and colour richness of the autumn “Autumn in Botanical Garden” (1987). In his works, the author also surprised the institution’s staff at the time of work.

Another subject that we encounter in the works of plastic artists is the sports fields. The plastic artist Vasile Toma in the work “The sports field of the Pedagogical Institute” (1983, oil, canvas, 880 × 990 mm, NMAM) evokes the life of young people. The complicated and dynamic composition is suggested by the anthropomorphic figures in action and the tree on the right, which balances with the statics and verticality of the poplars, whose falling shadows also create the sensation of movement. In the compositional realization, the plastic artist draws the attention of the perspective.

The theme of Chisinau sport is also approached in Florentin Leanca’s painting. A plastic artist in love with old Chisinau, he painted the work “Dinamo Stadium” (2007–2008, oil, canvas, 500 × 405 mm), a recent acquisition (2013) of NMAM. The artist’s study problem is the diversity of the invoice, the chromatic range being reduced to white-grey. The author warns about the change of human values, the stadium being at “rest”.



Figure 8. Vasile Toma “The sports field of the Pedagogical Institute”, 1983 (oil, canvas, 880 × 990 mm, NMAM).

The recreation area in the vision of Inesa Țîpina – “Recreational Park” (1988, oil, canvas, 900 × 1200 mm, NMAM), represented by the lively colour range, with the presence of various attractions, so dear to children, emanates positive emotions. The author’s works are distinguished by the plastic composition, the chromatic range masterfully directed, by the positive, optimistic atmosphere suggested by the vivid colours.

It should be mentioned that during the Soviet period, the plastic artists were evoking the theme of “labor” more than the subject of “rest”. However, the leisure places of the city is a quite simple theme, which bring you back to peace. At the same time, through painting, it can be seen the changes that have taken place over time in the field of reconstruction, reparation of architecture, urban landscape etc. The scientific novelty of the research lies in the fact that this subject has been little studied so far.

Following the evolution of the landscape of Chişinau, we can state that at the end of the 19th century - the beginning of the 20th century the painting



Figure 9. Inesa Țipina "Recreational Park", 1988 (oil, canvas, 900 × 1200 mm, NMAM).

stands out by realistic, meticulously processed compositions. The paintings from the '70s of the 20th century on the theme of recreational areas of the capital become more decorative, with a brightly colored palette, that are distinguished due to compositional variety. In addition, with the industrialization, the theme of the works changes, thus, it is possible to follow in the compositions the cultural and socio-economic evolution of the city. The genre of landscape is one of the most important in painting, through which we manage to preserve the identity, the national culture, but also to educate the feeling of love for the city, the attitude of patriotism and other behavioral attitudes.

Rezumat

Unul dintre genurile picturii de șevalet care rămâne mai puțin pretențios politicului este peisajul. Orașul Chișinău, unul dintre cele mai importante urbe ale republicii, a fost și rămâne motiv de inspirație pentru artiștii plastici: Eugenia Gamburd, Rostislav Ocușco, Mihail Petric, Filimon Hămura-



Figure 10. Florentin Leancă "Dinamo Stadium", 2007–2008 (oil, canvas, 500 × 405 mm, NMAM).

ru, Ludmila Țonceva, Vasile Toma, Inesa Țîpina, Petru Jireghea, Ion Jumatii, Ion Chitoroagă, Florentin Leancă ș.a. Unul dintre subiectele abordate de plasticieni, ce reflectă momentele de relaxare, odihnă, sport sunt centrele de agrement (parcurile, lacurile, stadioanele etc.). În articolul de față sunt analizate picturile din colecția Muzeului Național de Artă al Moldovei, dar și din colecțiile private ale plasticienilor cu referire la zonele de odihnă a Chișinăului. Aceste picturi realizate la tema supusă cercetării pot fi atribuite nu numai genului peisajer, dar în unele cazuri picturii de gen. Subiectul devine actual pentru pictori odată cu amenajarea parcurilor capitalei: Scurarul Ansamblului Catedralei Mitropolitane din Chișinău, Grădina publică din Chișinău, Grădina Botanică, parcul Valea Trandafirilor, parcul Valea Morilor, Lacul de acumulare Ghidighici, Stadionul Dinamo ș.a.

Cuvinte-cheie: Chișinău, centre de agrement, artă vizuală, pictură.

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Abstract

The relevance of the sociological problems of linguistic studies intensified in the second half of the 20th century, which was caused by social reasons, including the opportunity to use the process of mass learning of foreign languages to spread the strengthening of the policies of individual states. The author has specified the concept of “culture-oriented linguistics” for sociological consideration, since it is understood differently in different sources, and prospects of experimental studying. Within the framework of this study, an emphasis is placed on studying the influence of linguistic and cultural characteristics of communication space, including multilingualism, for the modern specialists. The priority is not just the knowledge of the language, but the development and formation of a multicultural personality. The topic of multiculturalism occupies a special place in the process of acquiring educational competencies.

Keywords: social processes, social institutions, sociology of language, self-stigma.

Введение

Лингвострановедение в социологии опирается на положение о том, что слово – это обозначение той или иной реалии действительности и поэтому в его семантике можно найти, выделить «экстралингвистическое» (внешнее) содержание. Связь лексических единиц с внеязыковой социальной действительностью осуществляется через значение. Лингвострановедение обеспечивает решение целого ряда проблем, в частности, главной филологической проблемы адекватного понимания текста. Интерес в мировой научной мысли появился с самого начала возникновения вопросов о связи языков и обществ. Отражение многих вопросов можно найти в мифологии различных народов. Значимость взаимосвязи находим в библейских текстах, на основе анализа которых можно вести речь о первичном едином языковом начале¹.

Различные источники подводят к выводу, во-первых, о первичном существовании единого человеческого языка; во-вторых, о возможности возникновения предпосылок появления и функционирования языков

¹ С.П. Жукова дэ Бовэ. *Секрет массовой проблемы овладения иностранным языком:* <http://www.rusarticles.com/authors/71002>.

лишь у социальной группы, объединенной общей деятельностью. В современной академической науке распространено мнение, что язык возник около полумиллиона лет назад, хотя существуют и оценки, с одной стороны, относящие это событие к более позднему времени (но не позднее 200 тыс. лет назад), с другой – к более раннему (до 1 млн. лет)². Кроме того, разница между современными языками настолько велика, что, во-первых, сейчас трудно найти общий корень в языках китайских и американских индейцев, а во-вторых, невозможно категорически отрицать, что у них был общий праязык. В последнее время очень много говорится о проблемах межкультурной коммуникации.

Роль лингвострановедческого подхода при обучении иностранным языкам

Термин лингво/страно/ведение можно расшифровать как «изучение культуры, истории, жизни страны в процессе изучения языка»³.

Согласно Т.Г. Фоминой, лингвострановедение – это методический аспект преподавания неродного языка, в котором с целью решения коммуникативных, познавательных и гуманистических задач проводится аккультурация иностранных учащихся, т.е. приобщение их к новой культуре через посредство языка, в процессе его изучения⁴.

Фундаментальный вклад в разработку теоретических основ лингвострановедения внесли Е. М. Верещагин и В.Г. Костомаров⁵. Лингвострановедение – это направление, с одной стороны, включающее в себя обучение языку, а с другой, дающее определенные сведения о стране изучаемого языка. Главная цель его – обеспечение коммуникативной компетенции в актах межкультурной коммуникации, прежде всего через адекватное восприятие речи собеседника и понимание оригинальных текстов⁶.

Согласно Н.Г. Комлева, лингвострановедение – это дидактический аналог социолингвистики, развивающий идею о необходимости слия-

² *Wie denken die Deutschen über ihre Muttersprache und über Fremdsprachen?: eine repräsentative Umfrage der Gesellschaft für deutsche Sprache / hrsg. von Rudolf Hoberg u. Karin M. Eichhoff-Syrus, Rüdiger Schulz, Wiesbaden: Ges. für dt. Sprache, cop. 2008, 48 S.*

³ Т.Г. Фомина. *Язык и национальная культура. Лингвострановедение: учебное пособие* (Казань: Казанский (Приволжский) федеральный университет, 2011): 9.

⁴ Фомина, *Язык и национальная культура...*, 129.

⁵ Е. М. Верещагин, В.Г. Костомаров. *Язык и культура* (Москва: Индрик, 2005): 1038.

⁶ О. А. Ужова. „Лингвострановедение, концепция «культурной грамотности» и словарь.” *Вестник ВГУ, Серия: Лингвистика и межкультурная коммуникация* (2006, № 1): 59-66.



ния обучения иностранному языку как совокупности форм выражения с изучением общественной и культурной жизни носителей языка⁷. По определению С.Г. Тер-Минасовой, лингвострановедение – дидактический аналог социолингвистики, развивающий идею о необходимости слияния обучения иностранному языку как совокупности форм выражения с изучением общественной и культурной жизни носителей языка⁸.

В обобщенном виде существуют два подхода к лингвострановедению:

- 1) территориальный – рассмотрение в системе географических наук, комплексное изучение материков, стран, крупных районов, включающее разнообразие сведений фрагментарного характера;
- 2) филологический – рефлексия, связанная с изучением иностранных языков.

Лингвострановедение в социологии опирается на положение о том, что слово – это обозначение той или иной реалии действительности и поэтому в его семантике можно найти, выделить «экстралингвистическое» (внешнее) содержание. Связь лексических единиц с внеязыковой социальной действительностью осуществляется через значение.

При реализации лингвострановедческого подхода лингвистика сочетается со страноведением, то есть язык изучается в культурном и историческом контексте⁹. Сегодня актуальным становится изучение феномена полилингвизма (многоязычия). Процессы глобализации, существование полилингвальных государств превратили полилингвизм в реальности нашего времени.

Степень интереса, проявляемого мыслителями к изучению феномена полилингвизма, в конкретные периоды общественного развития была различной¹⁰. Знакомство со страноведческим компонентом изучаемого языка было одной из главных задач полилингвов со времен античности. Изучение классических языков и трактовка исторических текстов до сих пор не мыслятся без страноведческого комментирования.

С конца XIV в. при освоении живых языков огромное значение при-

⁷ Н.Г. Комлев. *Компоненты содержательной структуры слова* (Москва, 2006): 192.

⁸ С.Г. Тер-Минасова, *Война и мир языков и культур: вопросы теории и практики межъязыковой и межкультурной* (Москва, 2008): 159.

⁹ М.В. Костюченко. «Лингвострановедческий подход при обучении иностранному языку.» *Международный журнал гуманитарных и естественных наук* (2016): 81–83.

¹⁰ Е.С. Хиневич, О.А. Волкова. *Теория и практика полилингвальной межкультурной коммуникации в менеджменте. Универсальное и национальное в культуре: сборник научных статей*, Белорусский государственный университет (Гуманитарный факультет, Минск, 2012): 382-390.

дается ознакомлению со спецификой стран изучаемых языков. Особенно это свойственно немецкой научной школе. Интеграция в единое «языковое сообщество» – плод политического господства, которое постоянно воспроизводится институтами, способными обеспечить господствующему языку всеобщее признание, – это условие, при котором складываются отношения господства. Одним из первых обосновал язык как социальную категорию В. Гумбольдт, указывая на то, что язык развивается только в обществе: человек понимает себя только при условии, что его слова понятны другим акторам. В. Гумбольдт рассматривал языковую систему с позиции идеалиста: язык – «саморазвитие духа»; абсолютный дух заставляет язык развиваться и изменяться; он одинаково проявляется у всех людей. Схожесть речи социальной группы людей стала объясняться общностью языкового материала и психического содержания; единство звукового материала – наследственностью; единство содержания – единством культуры языкового¹¹.

И.А. Бодуэн де Куртенэ утверждал, что язык индивида может развиваться только в обществе. Причины единства языка и общества И.А. Бодуэн де Куртенэ видел в единстве содержания. Он считал, что общество не только ограничивает развитие языка, но и является двигателем этого развития. Язык, соответственно, выступает как явление коллективно-индивидуальное. И.А. Бодуэн де Куртенэ в истории языка разграничивал две стороны – внешнюю и внутреннюю – и указывал на связь внешней истории: 1) с историей общества; 2) с историей литературы (культуры). История языка представляет две стороны: внешнюю (географически-этнологическую) и внутреннюю (грамматическую) – такой подход в настоящее время развивается при социологическом рассмотрении полилингвизма в контексте страноведения¹².

Решающим моментом в становлении современного рассмотрения взаимосвязи языка и общества является социологическое понимание Ф. Де Соссюром связи языка и истории нации, так как: 1) традиции нации отражаются в ее языке; 2) язык формирует нацию. На границы распространения языка влияют языковая политика, миграция¹³.

Группируя современные языки, ученые выделяют 20 основных языковых семей. Но нет единой точки зрения, сколько языков существует в

¹¹ В. Гумбольдт. *Язык и философия культуры* (Москва: Прогресс, 1985).

¹² И.А. Бодуэн де Куртенэ. *Язык и языки. Избранные труды по общему языкознанию* (Москва: Издательство АН СССР, 1963), Т. 2: 391.

¹³ Ф. де Соссюр. *Труды по языкознанию* (Москва: Прогресс, 1977): 696.

мире в настоящее время. Статистически, по минимальным оценкам, их число составляет 2,5–3 тыс., максимальная оценка дает в несколько раз большее количество¹⁴.

В зависимости от социальной функции языков в межгосударственном и межэтническом общении различают:

1. Мировые языки – языки, имеющие статус официальных и рабочих языков ООН (6 языков): английский (более 400 млн.); китайский (более 1,2 млрд.); испанский; русский; арабский, французский.

2. Международные языки – используемые в международном и межэтническом общении, имеющие юридический статус государственных или официальных языков в ряде стран (например, португальский – в Португалии, Бразилии, Гвинея-Бисау, Анголе).

3. Государственные языки – имеющие юридический статус государственного языка в одной стране.

4. Региональные языки – письменные, используемые для межэтнического общения, но не имеющие статуса государственных (тибетский и пр.).

5. Местные языки – практикуемые в бесписьменной коммуникации внутри этнических групп.

Экономические отрасли и профессиональные группы имеют языковую специфику в разных странах.

Современная социология языка рассматривает закономерности взаимодействия разных языковых систем в различных социальных условиях, а также социальные аспекты полилингвизма¹⁵.

В исследовании полилингвизма как фактора профессионально-отраслевой динамики опирается на два основных направления:

1) «синхронная» социология языка, изучающая все формы существования языков, функционирующие в определенный период истории общества в основных сферах человеческой деятельности;

2) «диахроническая» социология языка, придерживающаяся сравнительно-исторического принципа.

Изучение полилингвизма в пределах социологии языка можно проводить на двух уровнях – микроуровне и макроуровне.

¹⁴ Гуманитарные науки: Лингвистика. Онлайн Энциклопедия Кругосвет: <http://softsearch.ru/programs/49-872-jenciklopedija-krugosvet-download.shtml>.

¹⁵ Т.П. Липай, О. Волкова, Е. Хиневич. *Социологический подход к исследованию полилингвизма Теория и методика обучения русскому языку дошкольников в условиях полилингвизма: монография*, под науч. ред. К. Л. Крутий (Запорожье: ЛИПС, 2012):27-42.

Микроуровень социологии языка определяется особенностями речевого и межличностного поведения¹⁶.

На наш взгляд, полилингвизм играет заметную роль в социальных процессах, вызванных стремлением различных социальных групп через языковые факторы влиять на сложившиеся в социуме условия с целью удовлетворения определенных интересов. По мнению О.М. Рой, при столкновении последних обнажаются факторы доминирования одних групп относительно других (экономические, политические, экологические, языковые¹⁷.

Полилингвистические проявления могут наблюдаться в разных видах социальных процессов (по Р. Мертону) в зависимости от осознания населением их конечных результатов – явные (смысл и последствия которых населением осознаются), скрытые (смысл которых не осознается), «процессы-бумеранги» (смысл которых осознается, однако их последствия для населения не ясны¹⁸.

Полилингвизм как лингвистический капитал

Полилингвизм в сфере образования может пониматься как орудие «интеллектуальной и моральной интеграции»¹⁹. П. Бурдьё обозначил в социологическом подходе к проблеме языка в рамках следующих понятий: «культурный капитал», «лингвистический капитал», «лингвистический рынок»²⁰. Решающую роль в установлении новой языковой иерархии играет, вне всякого сомнения, диалектическое соотношение между школой и рынком труда²¹. Полилингвизм проявляется на всех уровнях современных социальных процессов:

- 1) глобальном уровне;
- 2) уровне больших социальных групп;

¹⁶ Ананченкова П.И. и др. *Менеджмент качества и инновации в образовании: региональный аспект*. Коллективная монография в 2 томах (Москва: Российский государственный торгово-экономический университет, 2010): 480.

¹⁷ О.М. Рой. *Исследования социально-экономических и политических* (Санкт-Петербург: Питер, 2004): 364.

¹⁸ Р. Мертон. «Социальная теория и социальная структура. Социальная структура и аномия.» *Социс* 2-4, (1992): 118-119.

¹⁹ Э. Дюркгейм. *О разделении общественного труда: Метод социологии* (Москва: Наука, 1991): 572.

²⁰ P. Bourdieu. *Language and Symbolic Power* (Cambridge: Polity Press 1991)

²¹ П. Бурдьё, «О производстве и воспроизводстве легитимного языка.» *Отечественные записки* 2 (23), (2005): 10-21.



- 3) уровне институтов и организаций;
- 4) уровне межличностных отношений²².

Полилингвизм может выступать неотъемлемым элементом социальных процессов: как следствием, так и причиной²³. Причинами могут быть:

- демографические условия – колебания численности населения, происходящие одновременно с языковыми изменениями;
- культурные, экономические, технические изменения, сопровождающиеся лингвистическими трансформациями;
- социально-политические конфликты, войны и т. д., спутниками которых являются языковые изменения.

С.И. Харниш пишет о массовом совершенствовании сознания людей, что связано с адекватным пониманием коммуникационных процессов. Выводы автора свидетельствуют о разном уровне коммуникативных навыков среди представителей социально-гомогенной группы сотрудников корпораций – полилингвизм сегодня представляется как фактор увеличения возможностей работника²⁴.

Процесс глобализации, с одной стороны, стимулирует единообразие языкового поведения людей как членов всемирного общества; с другой стороны, глобализация ведет к культурному многообразию, что в языковом поведении реализуется как полилингвизм.

Происходит процесс распределения сфер коммуникативных практик между активно функционирующими языками. В результате глобализации формируются новые типы глобальных коммуникативных практик: мировая наука, международное образование, международный бизнес.

На наш взгляд, профессионально-отраслевая динамика современного специалиста – это совокупность внутрипрофессиональных и межотраслевых изменений исходя из требований социума.

В условиях глобализации актуализируется потребность организаций в полилингвально подготовленных специалистах, способных использовать иностранные языки с целью социально-профессиональной коммуникации.

Макроуровень ориентируется на специфику употребления языкового варианта с учетом специфики социальной сферы его применения.

²² П. Штомпка. Социология социальных изменений (Москва: Аспект Пресс, 1996): 416.

²³ Analysis of the Specificity of the Social Integration of People Living in Urban and Rural Areas: <http://docsdrive.com/pdfs/medwelljournals/sscience/2016/2408-2412.pdf>.

²⁴ S.I Harnish. *Crosstalk and communication breakdown in professional interactions in English*: Manish Vyas (Ed), (New Delhi: PHI Learning Pvt Ltd., 2010): 421-435.

Как на микро-, так и на макроуровне в современный период особое внимание начинает уделяться социологическим аспектам полилингвизма.

Довузовская подготовка будущих менеджеров играет позитивную роль при условии использования преимуществ, складывающихся социально-экономических отношений, а также достаточно высокого полилингвального потенциала молодежи²⁵.

На основе данных теоретико-эмпирического исследования состояния полилингвизма в современном образовании сферы менеджмента сформулируем рекомендации по интенсификации подготовки полилингвальных специалистов:

- начинать изучение детьми иностранных языков с дошкольного возраста;
- увеличить количество часов, отводимых на аудиторное и внеаудиторное изучение языка интернационального профессионального общения менеджеров – английского;
- усилить контроль за уровнем освоения изученного выпускниками в высшем учебном заведении иностранного языка, вплоть до введения специальных заданий на итоговом государственном экзамене;
- включить в учебные планы требование обязательного изучения второго иностранного языка;
- интенсифицировать разработку и внедрение факультативных курсов и курсов по выбору, имеющих целью повысить полилингвальный уровень будущих менеджеров;
- активизировать осуществление дополнительных платных услуг студентам-менеджерам по углубленному изучению иностранных языков в учебных заведениях высшего профессионального образования.

Заключение

В социальных науках зависимости от функциональности менеджмент подразделяют на несколько видов. Полилингвизм наиболее характерен для следующих видов менеджмента:

- инновационный менеджмент;
- персональный менеджмент (самоменеджмент);
- международный менеджмент;
- экологический менеджмент.

²⁵ Т.П. Липай, Е.С. Хиневич. „К вопросу о развитии полилингвизма в центрах дополнительного образования.” *Вестник Таджикского национального университета (научный журнал). Серия гуманитарных наук, № 3/6 (176), Душанбе: Сино, (2015): 169-171.*



В контексте полилингвизма лингвострановедение включает в себя знание национальных культур в границах того, что нашло отображение в языковом материале – в национальных реалиях и лексическом фоне ряда слов. Лингвистические явления и лингвистические единицы обусловлены социальными факторами: с одной стороны, условиями коммуникации (временем, местом, участниками, целями и т. п.), с другой – обычаями, традициями, особенностями общественной и культурной жизни говорящего коллектива.

Для исследования полилингвизма важным является замечание С.Г. Тер-Минасовой, по мнению которой, язык не существует вне культуры как «социально унаследованной совокупности практических навыков и идей, характеризующих наш образ жизни. Если рассматривать язык с точки зрения его структуры, функционирования и способов овладения им (как родным, так и иностранными языками), то социокультурный слой, или компонент культуры, оказывается частью языка или фоном его реального бытия²⁶.

Согласно С.Г. Тер-Минасовой, к социальным компонентам, несущим национально-специфическую окраску, можно отнести следующие:

- традиции, обычаи, обряды;
- быт, тесно связанный с традициями;
- повседневное поведение, а также связанные с ним мимический и пантомимический коды, используемые носителями некоторой языковой общности;
- национальные картины мира, отражающие специфику восприятия окружающего мира, национальные особенности мышления представителей языковой общности;
- произведения искусства, отражающие традиции того или иного народа – носителя языка.

С позиций структурного функционализма полилингвизм может быть рассмотрен в контексте крупномасштабных социальных структур и институтов общества, их взаимоотношений и ограничений, которые они накладывают на конкретного человека (работника) или группу (профессиональную).

При рассмотрении полилингвизма в рамках социального конструктивизма можно отметить, что полилингвизм играет роль в конституировании профессионального сообщества и его представителей, во всей совокупности социальных процессов.

²⁶ С.Г. Тер-Минасова. *Война и мир языков и культур: вопросы теории и практики межъязыковой и межкультурной* (Москва, 2008): 159.

Полилингвизм содействует глобальной интеграции и унификации профессии. Полилингвизация может рассматриваться как социальный процесс структурирования пространства существования и взаимодействия представителей социально-профессионального сообщества в общепланетарном масштабе.

Полилингвизм помогает человеку справиться со страхами, с симптомами депрессии, общаясь в социальных сетях во время карантина в период пандемии коронавируса (COVID-19), влияет на психическое здоровье и благополучие, а также на профилактику самостигматизации²⁷.

Полилингвизм – это социальное явление, предполагающее способность субъектов использовать разные языки в качестве средств общения. Сегодня феномен выступает не только как отражение социальных структур и процессов, но и как фактор, оказывающий влияние на структуры и процессы социума, на профессионально-отраслевую динамику менеджеров.

Современный полилингвизм, с одной стороны, является отражением социальных структур и процессов, с другой – фактором, оказывающим на них непосредственное влияние. Институт образования имеет нереализованный потенциал обеспечения эффективной профессионально-отраслевой динамики будущих полилингвальных менеджеров.

Rezumat

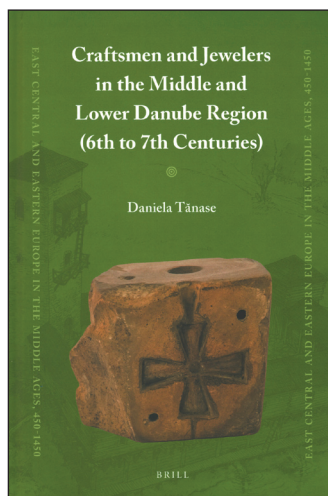
Relevanța problemelor sociologice ale studiilor lingvistice s-a intensificat în a doua jumătate a secolului al XX-lea, care a fost cauzată de motive sociale, inclusiv de posibilitatea de a utiliza procesul de învățare în masă a limbilor străine pentru a răspândi consolidarea politicilor statelor independente. Autorul a analizat conceptul de „lingvostranovedenie” din considerente sociologice. În cadrul acestui studiu, se pune accent pe studierea influenței caracteristicilor lingvistice și culturale ale spațiului de comunicare pentru specialistul modern, inclusiv multilingvismul. Prioritatea nu este doar cunoașterea limbii, ci dezvoltarea și formarea unei personalități multiculturale. Tema multiculturalității ocupă un loc special în procesul de dobândire a competențelor educaționale.

Cuvinte cheie: procese sociale, instituții sociale, sociologia limbajului, auto-stigmatul.

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²⁷ Т.Р. Липай. „The COVID-19 pandemic: depression, anxiety, stigma and impact on mental health.” *Probl Sotsialnoi Gig Zdravookhranennii i Istor Med.*, 28(5), (2020): 922-927; К. МIRONAVA, Т.Р. Липай. „The COVID-19 implications: the role of stress and stigmatization.” *Problemy Sotsial'noi Gigieny, Zdravookhraneniia i Istorii Meditsiny*. 29(2), (2021):194-196.

BOOK REVIEWS / RECENZII



DANIELA TĂNASE, *Craftsmen and Jewelers in the Middle and Lower Danube Region (6th to 7th Centuries)*, BRILL: Leiden/Boston, 2021, 406 pag., ISBN 978-90-04-38037-0

Monografia Danielei Tănase *Craftsmen and Jewelers in the Middle and Lower Danube Region (6th to 7th Centuries)* apare cu numărul 67 în seria *East Central and Eastern Europe in the Middle Ages, 450–1450*, coordonată de Florin Curta și Dušan Zupka, la Editura BRILL. De fapt, această carte este o versiune actualizată și dezvoltată a lucrării *Prelucrarea metalelor în lumea barbară la Dunărea Mijlocie și Inferioară în sec. VI-VII*, publicată de autoare în anul 2010 la Editura Excelsior Art din Timișoara, care la rândul ei a fost bazată pe teza de doctorat realizată sub îndrumarea dlui Dr. Radu Harhoiu, în cadrul Institutului de Arheologie „Vasile Pârvan” al Academiei Române și susținută public la finele anului 2006¹. Astfel, apreciem din start efortul autoarei care a reușit să dezvolte în versiunea engleză a lucrării mai multe compartimente, pornind de la îmbogățirea repertoriului descoperirilor de tipare, creuzete, linguri din lut etc., să actualizeze bibliografia, să extindă arealul geografic cercetat, să evidențieze anumite stiluri regionale etc.

Lucrarea este structurată în 12 compartimente, susținute de introducere, bibliografie, indice și 57 de figuri. În **Introducere** (p. 1-4) autoarea evidențiază rolul temei cercetate și faptul că în istoriografia românească tema prelucrării metalelor de către comunitățile barbare din regiunile Dunării de Mijloc și Inferioare la începutul Evului Mediu timpuriu a fost destul de modest aborda-

¹ Daniela Tănase, *Prelucrarea metalelor în lumea barbară la Dunărea Mijlocie și Inferioară în sec. VI-VII* (Timișoara: Editura Excelsior Art, 2010), 432 pag., ISBN 978-973-592-240-5.

tă. Secolele VI-VII au fost pe cât de bulversate, din perspectiva mișcărilor de populații, pe atât și de active din punct de vedere economic, social și cultural. De aceea, analiza, pe baza descoperirilor arheologice, a meșteșugului prelucrării metalelor reprezintă un pas important în cunoașterea comunităților care au locuit sau traversat regiunile dunărene în sec. VI-VII. De la bun început, Daniela Tănase menționează faptul că pentru realizarea scopului propus a realizat catalogul descoperirilor care include bunuri arheologice atestate pe teritoriile României, Ungariei, Serbiei, Republicii Moldova, Bulgariei și Ucrainei. Depășirea hotarelor politice actuale a asigurat autoarei o perspectivă complexă și mult mai reușită decât studiile în acest domeniu realizate anterior de alți arheologi români. O altă abordare reușită este compararea bunurilor arheologice descoperite în cimitire cu cele din așezări, foarte necesară în procesul analizei complexe a fenomenelor de producere și folosire a bunurilor culturale. Deși este clar formulată problema cercetării și modul ei de abordare, autoarea menționează în partea introductivă mai multe scopuri. Consider însă că lucrarea ar fi avut de câștigat în claritate și structură dacă ar fi avut ca centru un singur scop al cercetării din care să reiasă câteva obiective. O altă observație ține de designul lucrării, structura și volumul disproporționat al părților, unele fiind de doar 8, 16 pagini, iar altele de peste 70 de pagini. Înțeleg că întinderea fiecărei părți ține de volumul informației adunate și analizate. Dar, pentru a asigura o structurare echilibrată, unele părți puteau fi integrate.

Partea 1. History of the Research / Istoricul cercetărilor (p. 5-36) reconstituie în mod sumar istoricul cercetărilor arheologice și al descoperirilor de piese care au legătură cu procesul de prelucrare a metalelor, pornind de la piesele atestate la finele secolului al XIX-lea la Adony (Ungaria) și Felnac (România). Deși, autoarea anunță în introducere că abordează descoperirile din zone geografice mai extinse decât teritoriul actual al României, pe harta nr. 1 (p. 21) sunt prezentate doar descoperirile din România. Harta respectivă se încadrează perfect la punctul șase al acestei părți, era însă binevenită o hartă completă sau adăugarea și a altor hărți care să completeze tabloul descoperirilor în regiunile incluse în studiu. Un alt aspect abordat este statutul meșteșugăritului din perioada medievală timpurie în istoriografia europeană, punând în evidență unele lucrări, în special ale arheologilor din Europa Centrală și de Vest, care au cercetat această temă – J. Werner, H. T. Capelle, M. Müller-Wille, V. Turčan. În punctul cinci al primei părți sunt discutate succint descoperirile și abordările istoriografice din Europa de Est (Ucraina, Republica Moldova și Rusia), lucru care în final oferă posibilitatea cunoașterii situației privind stadiul actual al cercetărilor la tema discutată de D. Tănase.



Partea 2. **The Archaeology of Metalworking** / Arheologia prelucrării metalelor (p. 37-111) analizează, pe baza descoperirilor din așezări și morminte, anumite aspecte ale acestui meșteșug. La început sunt abordate atelierele atestate în siturile din Transilvania, Muntenia, Oltenia și Moldova, după care urmează piesele atestate în morminte, tezaure/depozite și descoperirile izolate. Partea a doua se încheie cu un subiect pe cât de important, pe atât și de dificil de realizat – Ateliere sau contexte funerare – un indicator al unui comportament cultural diferit. Această parte a lucrării este una dintre cele mai reușite, analizând majoritatea descoperirilor din așezări și necropole ce țin de procesul producerii pieselor de metal. Textul este însoțit de un material ilustrativ bine organizat, care completează foarte reușit tabloul acestei îndeletniciri. Dar, din nou, aceeași constatare, autoarea se oprește la descoperirile de pe teritoriul României, cu excepția descoperirilor de unelte din morminte atribuite avarilor, atestate pe teritoriile Ungariei, Austriei și Cehiei. Cred că ar fi fost utilă o abordare complexă a tuturor regiunilor vizate. Totodată, cred că trebuiau analizate mai bine particularitățile descoperirilor care reprezintă meșteșugul prelucrării metalelor – descrierea atelierelor și construcțiilor/amenajărilor caracteristice acestei îndeletniciri, categoriile de unelte în dependență de materia primă, metalul și respectiv bunurile produse.

Partea 3. **Sources of Raw Materials** / Surse de materii prime (p. 112-137) este, la fel, o realizare foarte reușită care ne explică sursele de materie primă, regiunile de unde se puteau obține și modul în care au fost prelucrate pentru a obține metalele necesare producerii bunurilor. Deși dispunem de informații reduse privind modul de obținere a materiei prime în Evul Mediu timpuriu, autoarea a reușit totuși să facă o analiză, pe baza descoperirilor arheologice, a zonelor cu potențial geologic de unde probabil a fost extrasă materia primă necesară. Totodată, autoarea analizează și posibilitatea comercializării materiei prime, aspect care rămâne la nivel de ipoteză. Cel mai bine este analizat procesul de reducere a minereului de fier prin folosirea diverselor amenajări (cuptoare, gropi, vase). Mai modest, dar sunt trecute în revistă și unele aspecte privind producerea aliajelor și folosirea metalelor prețioase. În perspectiva dezvoltării cercetărilor în acest domeniu, pentru o înțelegere mai bună a modului de dobândire și folosire a materiei prime, consider că trebuie să cooptăm specialiști în domeniul geologiei, metalurgiei, chimiei și fizicii care să ne ajute la interpretarea descoperirilor arheologice, iar analizele de laborator sunt indispensabile unui asemenea demers științific.

Partea 4. **Metallurgical Technologies** / Tehnologii metalurgice (p. 138-146) dezbate un șir de aspecte de ordin tehnologic, foarte importante pentru

a înțelege procesul de producere a bunurilor de metal. Deși într-o formă rezumativă, autoarea reușește să discute despre anumite tehnici de prelucrare atât a metalelor feroase (forjare, tăierea, perforarea, nituirea), cât și neferoase (baterie, cioplire, lustruire, gravare, perforare, ștanțare). Consider că și acest capitol are o perspectivă de dezvoltare și abordare mai profundă doar în colaborare cu specialiștii din alte domenii, extinderea și diversificarea analizelor de laborator, coroborarea rezultatelor cu celelalte descoperiri și contexte culturale etc. Dar, reieșind din starea actuală a cercetărilor, această componentă este un punct important de pornire.

Partea 5. Special Technological Methods for the Manufacture of Clothing and Harness Accessories Made of Non-Ferrous Metals / Metode tehnologice speciale pentru fabricarea accesoriilor de îmbrăcăminte și hamuri din metale neferoase (p. 147-163). O atenție aparte este acordată modului de producere a unor categorii de accesorii de îmbrăcăminte și piese de harnașament din metale neferoase. De altfel, aceste categorii de piese sunt cel mai des atestate în descoperirile funerare și rămân destul de reprezentative pentru secolele VI-VII. Astfel, autoarea încearcă să reconstituie procesul lor de producere și decorarea accesoriilor de îmbrăcăminte și bijuteriilor, precum și a unor piese de harnașament prin presare, turnarea în matrițe și turnarea prin metoda „ceară pierdută”, granulare și filigrană, încrustare, aurire, folosirea pietrelor colorate și inserțiilor de sticlă. Și acest capitol merită o dezvoltare prin folosirea posibilităților de analiză moderne (tomografie, analiza fizico-chimică etc.), coroborarea pieselor cu matrițele și alte piese utilizate la producerea lor, analiza comparativă cu datele etnografice etc.

Partea 6. The Tools / Instrumentele (p. 164-199) constituie o continuare logică a temelor abordate mai sus și este extrem de necesară pentru înțelegerea modului de producere a pieselor de metal. Astfel, pe baza descoperirilor arheologice autoarea prezintă succesiv un șir de unelte folosite de meșteri în procesul tehnologic, precum ar fi clește, ciocane, nicovale, burghie, pile, dălți, instrumente de gravat, pensete etc. Totodată, sunt analizate și o serie de forme imprimare, matrițe de presare cu decor incizat sau cu decor în relief, creuzete de diverse forme și mărimi, matrițe din lut și din piatră pentru cercei, mărgel, pandantive, cataramă și plăcuțe de centură etc. Consider că acest capitol putea fi integrat cu cele două părți anterior discutate și așa ar fi întregit tabloul tehnologiei producerii bunurilor de metal.

Partea 7. The Ornamentation of the Dies and of Contemporaneous Dress Accessories / Ornamentarea matrițelor și a accesoriilor de rochie contemporane (p. 200-216). Fiecare piesă arheologică este originală în felul ei, iar



cele ornamentate se deosebesc de celelalte nu doar prin elemente de decor, dar și prin aspectul lor estetic și simbolic. De aceea, analiza stilurilor și motivelor artistice este foarte importantă pentru înțelegerea nu doar a modului lor de producere, dar și a mentalității colective, a preferințelor artistice, a simbolismului acelor timpuri, a elementelor de credință etc. Astfel, D. Tănase a reușit prin acest capitol să realizeze o analiză a stilurilor și motivelor caracteristice secolelor VI-VII, evidențiind influențe externe, precum au fost cele de factură bizantină, germanică sau a popoarelor est-europene. Cel mai des și pe larg folosit motiv de decor rămâne în această perioadă cel de ordin geometric, și anume, cercurile concentrice și motivul cercului cu puncte. Mai rar, dar există piese decorate cu motive zoomorfe, majoritatea lor, după toate probabilitățile fiind aduse sau au aparținut popoarelor venite din părțile Asiei. Deși, creștinismul este încă modest atestat în regiunile de la nordul Dunării de Jos în sec. VI-VII, constatăm prezența unui șir de piese și chiar forme de producere care reprezintă semnul crucii. Pentru o interpretare complexă a stilurilor și motivelor practicate de comunitățile din sec. VI-VII ele trebuie analizate dintr-o perspectivă multilaterală și multiculturală, ținând cont de contextul arheologic al descoperirilor și practicilor funerare.

Partea 8. **The Cultural and Chronological Framework of the Tool Finds** / Cadrul cultural și cronologic al instrumentelor descoperite (p. 217-238) este dedicată unor probleme pe cât de importante, pe atât și de dificil de tratat. Încadrarea cultural-cronologică și etnică a comunităților pe baza pieselor arheologice este foarte riscantă. Deși nu excludem unele situații când tabloul cultural-etnic, per ansamblu, este mai clar, precum ar fi în cazul așezărilor și cimitirelor gepide sau avare. Dar și aici trebuie să ținem cont de faptul că sub incidența puterii avare au căzut diverse neamuri euro-asiatice. D. Tănase dă dovadă de curaj și discută mai multe aspecte privind cadrul cultural, cronologic și etnic al descoperirilor din sec. VI-VII, pornind de la mormintele cu depuneri de instrumente și analizând cele mai reprezentative descoperiri – Banda, Felnac și Sărata Monteoru. Totodată, sunt trecute în revistă și cele mai importante descoperiri din așezări, precum ar fi cele de la Dolheștii Mari și Suceava-Șipot (Moldova), Budureasca, Târgșor, Șirna, Aldeni, și Izvorul Dulce (Muntenia), Craiova, Doba, Făcăi, Găneasa, Groșșani, Insula Banului, Izvorul Frumos și Băbeni-Olteț (Oltenia) și Lazuri-Pișcolt, Bratei, Morești (Transilvania). Așteptările cititorului față de un astfel de capitol sunt de a vedea o propunere de încadrare, pe baza pieselor analizate, cronologică mai restrânsă, evidențierea unor etape în dezvoltarea comunităților de la nordul Dunării de Mijloc și de Jos în sec. VI-VII. Încercarea de a discuta la finele acestei părți a lucrării apartenența etnică a descoperirilor cred că

putea fi extinsă, pornind de la definirea conceptelor folosite – barbari, locali, alogeni, sedentari, nomazi etc.

Partea 9. **Metalworking Craft and the Social Status of Blacksmiths and Goldsmiths** / Meșteșugul prelucrării metalelor și statutul social al fierarilor și aurarilor (p. 239-264). Aspectele analizate în această parte a lucrării sunt foarte binevenite, deoarece datele arheologice trebuie interpretate și contextualizate economic, social, cultural etc. Deși, este foarte greu de reconstituit doar pe bază arheologică modul de viață și activitate al meșteșugarilor de la nordul Dunării de Mijloc și de Jos din sec. VI-VII, autoarea reușește totuși să discute despre diverse aspecte ale acestei comunități economice, precum ar fi mobilitatea meșterilor, prezența unor stiluri regionale și urmărirea arealului lor de răspândire. Iar la final, încearcă să răspundă la întrebarea - *Cine au fost meșterii?* Deși amintește descoperirile de instrumente de pe teritoriul Republicii Moldova ele lipsesc pe hărți (Fig. 56), ceea ce mi se pare incorect. Cred că ar fi fost binevenite concluzii la finele fiecărei părți pentru a evidenția răspunsurile la întrebările cercetate. Altfel, fiecare parte se încheie brusc fără o anumită finalitate.

Partea 10. **Concluzii** (p. 265-270) întrunește o serie de concluzii ale autoarei privind aspectele discutate în lucrare, evidențiind faptul că „În ciuda insistenței arheologilor români cu privire la unitatea culturii materiale pe teritoriul României actuale, inclusiv acele aspecte legate de prelucrarea metalelor, există un contrast clar între teritoriile inter- și extracarpatică”. Consider că, unele concluzii necesită o argumentare mai convingătoare, precum ar fi cazul acestei constatări: „Aurul a venit în cantități relativ mari în bazinul carpatic sub formă de plăți de tribut de la Constantinopol sau ca răscumpărare pentru prizonieri, precum și cadouri (vase, ornamente, articole de ham sau arme placcate cu aur și argint). Obiectele de bronz din ruinele orașelor romane au fost reciclate, la fel și diverse obiecte obținute din Bizanț...” Nu exclud astfel de situații, dar ele nu trebuie generalizate pentru întreaga perioadă și pentru toate regiunile de la nordul Dunării de Mijloc și de Jos.

Partea 11. **Catalogue of Finds from Romania** / Catalogul descoperirilor din România (p. 271-340) și Partea 12. **Finds from Central and Eastern Europe** / Descoperiri din Europa Centrală și de Est (p. 341-356) reprezintă catalogul descoperirilor pieselor ce au o legătură directă cu prelucrarea metalelor, atât din așezări, cât și din necropole sau descoperiri izolate. Obiectele de pe teritoriul României sunt prezentate, în formă de fișe, în ordinea alfabetică după locul descoperirii. Piesele descoperite în statele din Europa Centrală și de Est sunt prezentate după în câteva categorii, ținând cont de materia din care au



fost confecționate (bronz, piatră, lut...). Consider că, ar fi fost bine să se fi aplicat aceleași criterii de prezentare a catalogului descoperirilor și chiar realizarea unui catalog unitar.

În final, recomand lucrarea Danielei Tănase tuturor celor interesați de cercetarea meșteșugurilor prelucrării metalelor și confecționării bijuteriilor la începutul Evului Mediu timpuriu. Metodologia cercetării, tipologia propusă și modul de realizare a acestei monografii poate fi considerat un exemplu de cercetare complexă a unui domeniu de activitate economică a comunităților din sec. VI-VII – materie primă, instrumente, tehnici și tehnologii de producere, bunuri produse și funcționalitatea lor etc.

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