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OF CULTURE AND ARTS**

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OF UKRAINE**

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INNOVATIVE TECHNOLOGIES AND PRACTICES OF HUMAN SUBJECTIVATION

Polina Herchanivska

INTRODUCTION

In the acentric culture of the postmodern, the crisis of identification is increasingly manifesting itself, which consists in the destruction of the conditions of a holistic perception by a subject of himself as an autonomous personality. This process has especially deepened in the context of globalization, when in a single social-cultural field the multi-directional axiological systems have appeared, that greatly complicated the task of human self-identification. I'll draw attention to another aspect: repressions remain an integral element of social-cultural relations in society. Therefore, despite the fact that modern societies have received formal freedoms in the form of human rights, freedom of speech, the possibility of taking part in the political life of society, the threat to the subjectivation of the individual does not disappear. This actualized the study of the problem of human subjectivation in the context of contemporary social-cultural realities.

A number of theoretical and methodological aspects of the problem of human subjectivation in modern society have been developed by such scientists as H. Arendt, T. Adorno, M. Horkheimer, J. Baudrillard, Z. Bauman, J. Galbraith, H. Marcuse, F. Nietzsche, M. Foucault, E. Fromm, M. Hardt, A. Negri and etc. The main paradigms for this phenomenon were formulated, in particular: social-cultural reality creates conditions for the subjectivation; there is a two-way link between the subject and social-cultural reality. Based on these paradigms, we shall determine the specifics of the process of human subjectivation in the conditions of modern Ukrainian society.

Let us first of all comprehend the essence of M. Foucault defined this concept as follows: "I call "subjectivation" the process through which the formation of the subject takes place, more precisely, subjectivity, which, obviously, serves only one of the given possibilities of organizing a certain self-consciousness"¹. M. Foucault not only rejects the traditional understanding of subjectivity as an apriori and universal form of human existence, but also develops its new understanding. He states that the

¹ Фуко М. (2004) *Археология знания*. Санкт-Петербург: Гуманитарная Академия.

subjectivation is a process of becoming historically conditioned subjectivity, formed in the process of human development.

In the process of subjectivation, the formation of the individual as a subject takes place. Subjectivation is determined, on the one hand, by external social-cultural processes, when one becomes the object of various programs and of government practices (states, various institutions, social groups, etc). As M. Foucault noted, despite the fact that the state is inherently a totalitarian political force, it is a fairly powerful element of subjectivation².

On the other hand, subjectivation is caused by immanent processes of human self-development, that is, the subject acts as an active beginning of this process. Determinants of internal subjectivity are volitional, intellectual, moral, physical and other efforts of the individual, which help him to harmonize his own internal needs and interests with the social-cultural environment. That is, internal subjectivation is oriented towards reconciling a person's internal world with the external.

So, the subjectivation of the personality is a process and at the same time a condition for the realization of potential human abilities, in the surrounding social-cultural environment.

The process of human subjectivity always occurs in a certain social-cultural context, therefore, we consider this phenomenon from the perspective of such aspects: 1) Ukrainian social-cultural realities in the postmodern era; 2) technologies of mass manipulation and resistance; 3) innovative technologies and practices of human subjectivity.

1. Ukrainian social-cultural realities in the postmodern

I note that postmodernism is not so much an era in the development of social reality as of consciousness. First, postmodernism has given new semantics and axiology to atheistic thinking. "The death of God" has become a fundamental metaphor of postmodern philosophy, fixing in its content a paradigmatic attitude towards rejecting the idea of external forced casualness³. The introduction of this metaphor into the semantic space of modern culture indicates a reorientation of understanding causality as an external factor in understanding it from the point of view of the immanence of the subject, focusing on the subjectivity of its perception.

Secondly, postmodernism dissociates itself from the metaphysical linear (evolutionist) paradigm of dynamic processes leading to the unification of the ways and forms of historical development: it offers the idea of non-linearity of

² Ibid.

³ Грицанов А.А, Можейко М.А. (Ред.) (2001) *Постмодернизм. Энциклопедия*. Минск: Интерпрессервис: Книжный Дом.

the processes of social-cultural changes. Refusing forced causality, postmodernism interprets transformational processes as self-organizing, and the social-cultural system as an open, self-developing one.

Thirdly, the universal principle of the organization of social-cultural space is plurality, collage. The postmodern model of the historical process determines the coexistence of alternative codes and values in a single social-cultural field. According to Z. Sardar, in this context, the cultural-adaptive potential of the postmodern, aimed at the dialogue of cultures without any restrictions (political-ideological, ethnic, religious) is manifested⁴.

Fourthly, postmodernism breaks with everything connected with metaphysics and, first of all, with logocentrism, which in the context of postmodernity acquires a negative meaning as the reason for forced, repressive, totalitarian social-cultural relations. The reformist position of postmodernism (the refusal to build a universally rational model of the world) excludes the very idea of its integrity, hierarchical structure, harmonious ordering. The fundamental paradigm of the culture of this era is the concept of “chaos”, and the basic postulate is “order from chaos”. The phenomenon of chaos and instability is interpreted by postmodern reflection as a fundamental basis for the formation of new cultural configurations, and a text devoid of primary content is regarded as an open field for updating plural contents. From the position of S. Lash, chaos permeates all levels of being, and modern social reality is “disorganized capitalism”⁵.

Radical changes in the worldview provoked the heterogeneity of the semantic landmarks of the social-cultural thinking of various layers of Ukrainian society: today, in a single social-cultural space, axiological systems co-modern, modern, post-modern coexist. This determined the deepening of the identification crisis: in the complex interweaving of worldview paradigms, it is very difficult for a person to choose a specific life position. Explaining the paradox of modernity, R. Laing expressed the view that personality lacks a sense of individuality, autonomy, self-worth, it experiences its Self as partially alienated from the body⁶.

I note that the crisis of identification occurs against the background of social-cultural entropy in Ukrainian society, which is characterized by post-Soviet countries. The situation is characterized by a violation of the integrity of the system of value orientations, forms and norms of social organization and regulation, channels of social-cultural communication, complexes of

⁴ Sardar Z. (1998) *Postmodernism and The Other: New Imperialism of Western Culture*. London: Pluto Press.

⁵ Lash S. (1994) *Economies of Signs and Space*. London: Sage.

⁶ Лэнг Р. (1995) *Расколотое Я*. Санкт-Петербург: Белый Кролик.

cultural institutions, stratified means of life, ideology, morality, mechanisms of socialization and inculturation of an individual, normative parameters of its social and cultural relevance to the community. This is due to: firstly, the political crisis in the internal development of society, the decline in the efficiency of social regulation institutions; secondly, with the social-economic crisis that has led to major changes in the nature of people's social interests and needs; third, with the crisis of the dominant ideology (secular and religious), which has lost its socially consolidating and mobilizing capabilities. Previous regulators of social life have ceased to dominate the spiritual life of society, and new ones have not yet formed.

The approach to the economic development of Ukrainian society has changed. Instead of the ideological platform on which inter-ethnic interaction took place in the Soviet period, the economic factor becomes decisive. The essence of market relations is also being transformed: private ownership is replaced by public ownership, and the tendency of rapid property stratification is observed.

One of the characteristic features of a society is its extraordinary individualization, and the dominant principle in the human mind is "each for himself".

More and more people are leaving the zone of regulation of consciousness and behavior by means of the dominant in the Ukrainian society cultural system. The efficiency of the process of socialization and inculturation of a person by means of education, the Church, state ideology and propaganda is decreasing. Due to the breaking of stereotypes of consciousness and behavior of people, the devaluation of traditional norms and rules of life, social interaction, morality, value imperatives, and taboo become more evident. People's dissatisfaction with living conditions and orientation to western standards of living become more present. The period of violation of the functional integrity and balance of the social-cultural system is accompanied by a decrease in the level of subjectivation of the person.

Changes in the social-cultural sphere of Ukrainian society are imposed on the matrix of globalization processes. The model of globalization is based on the presumption of multiculturalism as a social phenomenon "the coexistence of many different ethnic, cultural, denominational groups in the same social space"⁷. Its basic mechanism is social-cultural communication, aimed at ensuring active and equal dialogue of different cultures, their mutual understanding and mutual enrichment.

⁷ Тонкова Е.Г. (2009) Понятие мультикультурализма: основные концепции. *Фундаментальные проблемы культурологии* (Т. VII, С. 5–16). Москва, Санкт-Петербург: Новый хронограф, Эйдос.

In fact, it's the perfect model. If multiculturalism and the equality of national cultures exist "de jure" and are enshrined in the UNESCO Universal Declaration, then "de facto" they remain only as an intention. According to U. Kimlicka⁸, in Western society, the principle of equality of rights applies only to people who belong to the Christian European culture and share its core values. All other cultural communities (ethnic groups, religious denominations, etc.) tend to experience various forms of political or cultural discrimination. In other words, the principle of equality applies a priori to a limited community, others find themselves marginalized, and a system of regulatory prohibitions is formed for them.

The marginalization of individual groups by social-economic criteria or social-cultural identity has become a flip side to creating a single social-cultural space. Stumbling block in the issue of multiculturalism were, in particular: unequal basic models of national politics (cultural, religious, etc.) of states aimed at developing national identity, consolidation of society; inequality of national legal models.

Thus, in practice, Western democracy has not been able to overcome the misunderstandings associated with ethno-cultural diversity. In response to multiculturalism, the concept of abandoning the idea of integration into the global cultural space arose. Various models of intercultural relations are created, based on the differentiation of national cultures (U. Kimlicka, C. Kukatas)⁹.

Cultural unification in the architectonics of globalization provokes the intensification of the process of human awareness of their belonging to a particular ethnic community. In many countries around the world, people's interest in their roots is reviving, and Ukraine is no exception. Decades of relativization from national values, ideologies and beliefs, the unification of behavior patterns and worldviews offered by the mass media have created a keen sense of loss of identity in Ukrainian society.

However, ethnic identity is a key principle of European democracy in the context of globalization, the main element of which is the creation of a common European social-cultural space while preserving the cultural roots of each ethnic group as the basic unit of the ethnic sphere. Psychological factors intensifying this process are the same for all mankind in the era of radical transformations that cause social instability – is the search for life landmarks. More and more attention is paid to the ways of life of previous generations,

⁸ Kymlicka W. (2006) Immigration, Multiculturalism and the Welfare State. *Ethnics and International Affairs*, 20(3), 1–20.

⁹ Kukathas Ch. (2003) *The Liberal Archipelago: A Theory of Diversity and Freedom*. Oxford: Oxford University Press; Kymlicka W. (2006) Immigration, Multiculturalism and the Welfare State. *Ethnics and International Affairs*, 20(3), 1–20.

people are turning to the faith, traditions, norms and values that were produced by their ancestors.

Aware of being part of a particular ethnic community with its established characteristics, one feels psychologically secure in an unstable, saturated information world. However, through the internationalization of social life, modern ethnic communities are largely detached from ancient traditions, the behavior of ancestors is no longer regarded as a standard. However, humanity is increasingly coming to the conclusion that it is necessary to maintain communication between generations.

While researching the problem at the ethnic level, it should be borne in mind that the culture of the Ukrainian ethnic group has never been homogeneous. At this level one can trace the diversity of forms of intercultural interaction, each of which during social-genesis has developed an immanent system of protective mechanisms for storing and reproducing life experiences and traditions, as well as an immanent sense of identity.

Local (regional) the ethnic cultures do not have a significant gap in typological characteristics: they contain universal traits, common cultural invariants. Therefore, the basis of interregional cooperation, as a rule, is the principle of peaceful coexistence and equal cooperation. The interaction between local cultures, which differ in confessional featured and social-cultural development, is more complicated in results and consequences.

Let me give an example of the situation in the western and eastern regions of Ukraine. The prolonged existence of Ukrainian lands in different imperial systems with different cultural and religious orientations, differences in the dynamics of social-economic development of these systems and different direction of the vectors of intercultural contacts contributed to the formation of heterogeneity of regional self-identification. Today, the East of the country is a conglomeration of local cultures with a dominant Orthodox orientation, the West is a congregation of cultures focused on the Western European version of Christianity. As a result, despite the general cultural basis that was formed within the Ukrainian ethnos, there have been repeated cases of rejection of cultural elements of another denomination throughout history, this trend is still being observed today.

Modern integration and differential processes in culture are in dynamic correlation: on the one hand, the development of human civilization is aimed at overcoming intercultural opposition, on the other, on enhancing the potential of each national culture. This is the essence of the contradiction of globalization, which gives rise to a whole set of determinants of reduction of human subjectivity in Ukraine.

Thus, there is a two-way link between social-cultural reality and the subject: social structures create the conditions for subjectivation of the individual, and the individual, in turn, constructs the social-cultural space, influencing the process of social development.

2. Technologies of mass manipulation

Another factor influencing the process of subjectivation is the repressive element of social-cultural regulation of society. Repression in totalitarian societies is usually associated with punishment, but it is manifested not only in punitive measures but also in practices and technologies that carry the threat of suppressing the process of human development, freedom and subjectivity. If terrorism is perceived by the world community as a repressive form of influence, then the techniques of mass manipulation are far from being evaluated by all in a repressive context.

Mass manipulation technologies are social tools of informational and psychological influence on a person (or group of people) by programming certain ideas, tastes, values and needs in him, which prevents him from being subjected. They are an important tool in the hands of actors seeking power and profit. The main purpose of repressive technologies is to exercise control over people and to purposefully transform the social-cultural space through the generation of certain meanings and values. The psyche of the individual is exposed to impact at all levels, both conscious and unconscious.

There are no abstract, unified mass manipulation technologies. The dynamism of social-cultural change requires constant updating of this tool of social practice. Moreover, the threat of subjectivation of man comes from phenomena that almost impossible to exclude from public life (Internet, television, press, advertising, etc.).

N. Chomsky identified ten main ways of manipulating with the help of the media: 1) diverting attention from important problems and shifting the focus to minor aspects; 2) creating a problem and then suggesting a way to solve it (“problem-response-solution”); 3) gradual application method (used in situations where it is necessary for society to take an unpopular measure); 4) delay in execution as a way to “sell” an unpopular decision; 5) appeal to the general public using such arguments, characters, words and intonations as if they were school-age children with developmental delays or mentally disabled individuals; 6) encouraging citizens to be passionate about mediocrity; 7) keeping people in ignorance, cultivating mediocrity; 8) enhancing self-guilt; 9) to know more about people than they know about themselves; 10) emphasis on emotions to a much greater extent than thinking¹⁰. Of course, this is not a complete list of the media arsenal.

The introduction of mass manipulation technologies into the modern Ukrainian society marks the transition from a direct, undisguised attitude to man, as things are, under conditions of totalitarianism, to influence concealed

¹⁰ Chomsky N. (2011) *10 ways to manipulate using the media*. URL: <http://inosmi.ru/world/20110517/169481135.html>

by the slogan of “human rights”. While in the totalitarian regime mass manipulation technologies played an important but not dominant role, “their development took place against the background of the continuous radiation of repressive violence in mass forms, which led people to a state of immanent fear”¹¹, nowadays, these technologies are aimed at on the psychological subordination of man, become a major tool in the social-cultural regulation of society.

However, there is a different point of view on this phenomenon. For example, S. Kara-Murza believes that manipulation is not violence, but a temptation¹², which must be countered by the resistance potential of man. In its essence, resistance as a structural element of social relations, is a deliberate process of protecting a subject from repressive technologies and practices. It can take different forms of active counteraction (resistance, struggle, dissent, disobedience, confrontation, sabotage, etc.), as well as forms focused on constructing an individual, activating his immanent willpower and striving for freedom.

In this context, attention should be drawn to such point: mass manipulation technologies are firmly entwined in the institutions and practices of modern society, and cannot be immediately abolished in a revolutionary or violent way. Prohibition measures only encourage the search for new, more powerful, repressive algorithms. As experience of world history shows, a much more effective means of resistance in modern conditions is to resort to the inherent intellectual and moral foundations of man, to such determinants of his subjectivity as *will* and *freedom*.

According to M. Mozheiko, the will is a “phenomenon of self-regulation by the subject of his behavior and activity, which provides a vector orientation of the immanent states of consciousness on the objectified exterior goal and concentration of efforts to achieve it”¹³. In concepts, the postmodern concept of “will” is used to refer to a principle that is free and not restricted by the discursive rules of subjectivity.

The starting point of a volitional act is the person’s awareness of significance of the formulated purpose, its correspondence (or inconsistency) to the immanent value scales. This act consists of making a decision that is substantially in line with the stated goal and mobilizing efforts for its realization. The result of a volitional act of subject is determined by its immanent attitudes, subjective orientation to certain social values, inclination to a specific set of actions, speed of reaction to the proposed situation, etc.

¹¹ Михайличенко Д.Г. (2011) *Субъективация современного человека в контексте технологий массовой манипуляции* (Дис. доктора филос. Наук). Уфа.

¹² Кара-Мурза С.Г. (2006) *Манипуляция сознанием*. Москва: Эксмо.

¹³ Грищанов А.А. Можейко М.А. (Ред.) (2001) *Постмодернизм. Энциклопедия*. Минск: Интерпрессервис: Книжный Дом.

Another universal of human subjectivity is freedom, which captures “the possibility of activity and behavior in the absence of external targeting”¹⁴. However, the absence of external goal setting is not yet a guarantor of true freedom, because it does not exclude the objective-subjective component of activity determined by social-cultural conditions.

Within the framework of social-cultural interpretation, in the content of the concept *freedom* implicitly incorporates the vector of alternative, conscious opposition to social pressure: freedom is constituted as a result of overcoming *non-freedom*. The desire for freedom of the modern man is an action aimed at neutralizing the repressive influence of various forms of information and psychological violence. The level of human freedom depends to a large extent on its inherent intellectual and volitional potentials and reactions to information flows. However, this form of resistance must contain a moral dimension, not new, more sophisticated and flexible mass manipulation technologies.

Therefore, successful counteraction to mass manipulation technologies requires rather than regulatory and institutional measures, but the formation of existential conditions for human subjectivation. Forming its own existential space, the person is oriented towards neutralizing the repressive influence of mass manipulation technologies, which requires long efforts aimed at his subjectivation, crystallization of his resistance. Resistance to the repressive influence of mass manipulation technologies is not the goal itself, but a necessary condition for the spiritual development of a modern person and is functionally dependent on its intelligence and social-cultural level of society sophisticated and flexible mass manipulation technologies.

3. Innovative technologies and practices of human subjectivation

Today, in an era of identification crisis, when the whole perception of the subject as a personality is destroyed, when a person is unable to clearly define his position in relation to the existing plural axiology, the paradigmatic attitudes of postmodernism are transformed. Deconstructionism is being replaced by a new version of postmodern philosophy (after-postmodernism), the vector of which is shifting markedly towards communication, emphasis is transferred from text reality to communicative reality and centered around the concept of “Other”. That is, in contrast to the classical philosophical tradition in which human consciousness has been positioned as object-oriented, as well as postmodernist text-oriented classics, the modern version of postmodernism is actualized through subject-subject relations.

¹⁴ Грицанов А.А., Можейко М.А. (Ред.) (2001) *Постмодернизм. Энциклопедия*. Минск: Интерпрессервис: Книжный Дом.

In semiotic culturology by Lotman, two basic communication models are identified: through the channels “I”–“I” and “I”–“Other”¹⁵. Each act of communication is aimed at solving a specific problem. In auto-communicative structure (“I”–“I”), there is a shift in the code and context of the transmitted message, the content of information is transformed, which leads to a change in the self. Essentially, the auto-communication process is the basis of the cultural identification of a person. At the same time, it acts as a creative cultural mechanism aimed at the formation of new ideas, meanings and artistic forms, as well as a mechanism of socialization and personality development.

If auto-communication realizes itself through the dichotomy “I”–“I”, then communication-through dualism “I”–“Other”. The communicative culture of personality is a complex system containing creative thinking, the culture of speech impact, the gesture culture and plasticity of movement, culture of perception of communicative actions of the partner, culture of emotions, etc. Communication is a semantic aspect of social interaction aimed at achieving social cohesion while maintaining the individuality of each communicator.

It is possible in the presence of the following components: 1) at least two communicators who are endowed with consciousness and use common semiotic means (linguistic, para-linguistic); 2) a situation the sense of which communicators are trying to understand; 3) texts reflecting the content of the situation in a common language for them; 4) motives and goals that motivate subjects to communicate; 5) the process of material transmission of text.

Tolerance is the core of postmodern communication. In the process of communication, an informative and existential interaction between the communicants is formed, through which mutual understanding is achieved. As a result of the dialogue the generalization of values takes place, that allows to free the communicative action from inherited patterns of behavior. Mutual understanding is achieved by knowing the language of the Other in all its specificity, complying with dialogue rules devoid of any compulsion (institutional, cultural, etc.) as well as by agreeing action plans. True consensus is achieved through equitable dialogue and clear argumentation.

In the context of verbal-communicative practices of postmodernism, a special place is given to discourse, as “a verbally articulated form of objectification of the content of consciousness, which is governed by the type of rationality dominant in a certain social tradition”¹⁶. M. Foucault indicates

¹⁵ Лотман Ю.М. (1992) О двух моделях коммуникации в системе культуры. *Статьи по семиотике и топологии культуры*. (Т. 1, С. 76–90). Таллин: Александра.

¹⁶ Грицанов А.А. Можейко М.А. (Ред.) (2001) *Постмодернизм. Энциклопедия*. Минск: Интерпрессервис: Книжный Дом.

that the functioning of discursive practices in the postmodern era is based on immanent rules, concepts, and strategies¹⁷. If in the framework of the metaphysical tradition, discourse is understood as a rational-logical procedure for deciphering the inherent content of the world, then postmodernism interprets discursive practices as an act of communication. Its space contains linguistic practices and behaviors that are manifested in accessible, forms that are necessary to understand the text. They give an idea of the communication participants, their goals, as well as the conditions of formation and perception of the message.

Discourse is an essential component of sociocultural engagement with a particular social-cultural and social-psychological context. It occurs in a content field with inherent paradigm and particular linguistic environment. Its communicative acts manifest specific vocabulary, semantics, pragmatics, syntax, characteristic of a specific social-cultural sphere. Therefore, the term “discourse” needs to be properly defined (“political discourse”, “scientific discourse”, “philosophical discourse”, “journalistic discourse”, etc.).

The main axiological paradigms of modern discourse are dialogism, pluralization of points of view. Postmodernism fundamentally denies the one-dimensionality and stability of truth, its universalist understanding. Discourse creates (often spontaneously) conditions for its multi-vector structuring. In the postmodern interpretation there is a departure from the understanding of its content as a final statement, which does not imply any variation. Attention is focused on nonsense as a determinant of content openness. This approach is linked to the general postmodern paradigm regarding the chaos of the universe.

By focusing on the spontaneity of discourse, postmodernism brings to the fore a creative factor, which opens up opportunities for unpredictable decisions. Thus, the linguistic turn, made by the philosophy of the XX century, marked the change of paradigm (the transition from the philosophy of consciousness to the philosophy of language).

This process develops in parallel with the deepening of the essential characteristics of the consumption society and the expansion of the information and communication space, which is a common structured media system. According to J. Baudrillard, the development of communication, and especially of mass communication, forms such a phenomenon as “mass”,¹⁸ an integral feature of which is anonymity and incorporeity. The

¹⁷ Фуко М. (2004) *Археология знания*. Санкт-Петербург: Гуманитарная Академия.

¹⁸ Бодрийар Ж. (2000) *В тени молчаливого большинства, или конец социального = A l'ombre des majorités silencieuses, ou la fin du social*. Екатеринбург: Изд-во уральского университета.

mass is not a carrier of autonomous consciousness, it is a multiple subject living in the information technology world, an active consumer of what the media offers.

By limiting the perception of the surrounding space by the sphere of signs, the mass loses touch with everyday reality, replacing it with virtual reality. Communication for her is a continuous absorption of signs. It translates all messages from rational plan into plan imaginary and forces it to circulate according to its immanent rules. Communicative manipulation often transforms the passive mass into an object of information aggression, forcing it into a new vision of the social world. In modern conditions, a new type of mass culture is being formed, and its conceptual field is gaining new content. It reflected the features of the postmodern era – carnivalization, hybridity, language play, etc. The main paradigms of mass culture are: focus on the use of manipulative techniques and technologies for managing cultural objects, states and processes; focus on solving urgent immediate problems. This is especially evident in advertising and political technologies.

The mass culture space of the postmodern era is very mosaic and, due to the dynamism of information technology, is extremely mobile. Manipulative technologies, deforming the content of modern mass culture, lead to the active transformation of its axiological and semiotic spheres. Important social values such as “justice”, “freedom” are transformed, vital values come on the first plan. In the semiotic space, signs and symbols become objects of conscious production, creating virtual communicative reality. The main task of mass culture is to refocus consumer attention from the problematic interpretation of real life to the spectacular perception of entertainment products, to emotional relaxation and the game of human imagination. The holistic metaphysical system of knowledge and values has been changed by a system of changing attitudes that are broadcast through mass communication channels.

In the context of globalization and virtualization of modern society, mass culture becomes an important resource for constructing identity in society, giving individuals a certain set of cultural patterns, codes, and styles. Thanks to innovative technologies, the system of social-cultural design, programming and modeling, it becomes one of the main institutionalization mechanisms influencing the process of social development, defining its value orientations. Despite its focus on the “average” consumer level, mass culture is certainly a manifestation of a new type of culture that accumulates social experience of human life at the post-industrial stage of social evolution, assuming the functions of personality inculturation in the context of Ukrainian realities.

Postmodern philosophy in a new way articulates an understanding of linguistic reality. The modern stage of its development was the concept of

language games K.-O. Apel¹⁹. I note that the term “language games”, introduced in the scientific” circulation by L. Wittgenstein, means one whole – the language and the actions with which it is interwoven²⁰. If earlier the interpretation of this concept in the context of cultural practices was based on the interaction between the subject and the text, then K.-O. Apel gives it new content by considering it as subject-subject communication. In this context, language becomes not only a mechanism of objectification of information, but also a mediator of understanding between subjects. The regulatory mechanism of communication (interpersonal, public or mass), by K.-O. Apel, becomes a dialogical understanding of the subjects.

The paradigmatic basis of language games is to understand them as a form of life. The gaming industry needs a specific field that simulates gaming reality, and the gaming community creates virtual reality for itself. He ceases to live in the objective world, and language games become a means of experiencing this conditional reality.

In J. Huizinga’s interpretation²¹, play is an area of emotionally rich communication that unites people with different social status and professional experience. It transfers the accent from the usual communicative norms and traditions to linguistic relaxation, permissiveness. The highest value of the game is not the result, but the gameplay itself. The game frees consciousness from the oppression of stereotypes, gives the individual the possibility of self-realization that goes beyond his social roles, promotes his self-expression. The game has two original elements: the first is related to the emotional experiences of players and recipients; the second, on the contrary, is rational in nature, within which the rules of the game are clearly followed.

The language game has thematic and situational demarcation. Giving maximum freedom to its participants, it is realized within the context of which is reduced to certain rigid rules, determined by a specific situation. Therefore, a language game is creativity by certain rules, a process of searching and finding the truth, the result of which cannot be determined in advance. Its rules are not fixed forever; they can vary throughout the game. When involved in the game, the communicator introduces an element of improvisation into the text, which often results in a result other than the programmed one.

Pluralism, the dynamism of social being determine the emergence of various language practices with different rules and specific language. An essential component of postmodern culture are *performance* and *happenings*,

¹⁹ Апел К.-О. (2001) *Трансформация философии*. Москва: Логос.

²⁰ Витгенштейн Л. (1995) *Философские исследования* (Ч. 1). Москва: Гнозис.

²¹ Хейзинга Й. (1997) *Ното Ludens. Статьи по истории культуры*. Москва: Прогресс–Традиция.

in which the role of complicity and co-creation of the artist and the recipient increases, and the distance between them decreases. Non-pragmatism (“action for the sake of action”), dialogue, development in time, a combination of different types of art, primacy of action and gesture, provocation, social orientation of actions characterize performance and happenings.

These forms are syncretic forms of art. In them, painting, graphics, sculpture, theater, music, mime art create an unbreakable unity. However, unlike theatrical action, these actions are not rehearsed, they have no clear plot. Performance and happenings reflect the problem of the modern postmodern. The authors actively address social and political topics, and criticize the authorities. Their main feature is the effect of feedback between creator and viewer. In both cases, the recipient becomes an observer and accomplice of creative action, in which improvisation and chance play a big role.

However, there are some differences between these forms. Performance, while refraining from excessive theatricality, still remains a form of parateatral action. The play is transferred from the theater to museums and galleries and is performed according to a certain plan (scenario). Happening is also a theatrical act, but the play has no clear script. The role of improvisation, spontaneity, unpredictability in it is more important than performance, higher the degree of activity of the audience. It is based on the spontaneous reactions of the performers, which provoke the play activity of the audience. Today a new form of actionism has emerged, Internet Street Performance. Promotional videos and photos, falling into the Internet space, significantly increase the number of viewers.

The game nature is also evident in the *flashmob*, which is interpreted as a form of entertainment and experimentation with virtual and real realities. This is a pre-planned mass action organized through the Internet or other modern communication means to draw public attention to certain problems. The purpose of these actions is different: entertainment, trying to get thrills, disruption of daily life and more. Flashmobs can acquire political (political-mob) or social (social-mob) shades, often focused on group protest (flash protests), but are always organized according to certain rules: anonymity of participants of the action; strict adherence to the rules of the game and its scenario; violation of laws and moral principles of society; prompt holding of the action; flashback action with a surprise effect. Flashmob fully implements the game principle, the motive of which is not the result, but in the process. It is in games that society manifests his understanding of life and the world.

Thus, the plurality, the dynamism of the postmodern, its focus on constructing its own reality gave impetus to the development of various contemporary cultural practices (discourses, language games, etc.) with different rules and specific language.

CONCLUSIONS

As a result of the analysis of the problem of subjectivation of the modern man we come to the following conclusions: 1) subjectivation is the process of becoming *historically* conditioned subjectivity of man; there is a two-way link between social-cultural reality and the subject: social structures form the conditions for subjectivation of the individual, and the individual, in turn, constructs the social-cultural space; 2) an important factor influencing the process of subjectivation is the repressive element of social-cultural regulation of society; the most effective tool of repression in modern conditions is the technology of mass manipulation; 3) effective protection against information-psychological influence on a person is to appeal to immanent intellectual and moral foundations of man, to such determinants of his subjectivation as will and freedom; resistance to the repressive influence of mass manipulation technologies is not the goal itself, but a necessary condition for human subjectivation; 4) vector of the process of human subjectivation shifted towards communication at the present stage of the post-modern (after-postmodern); the main axiological paradigms of modern discourse are dialogism, reinforcement of one's personality, pluralisation of points of view.

SUMMARY

The section of the monograph is devoted to one of the fundamental problems of modern cultural studies. The process of human subjectivation in modern Ukrainian society is analyzed. The influence of social-cultural realities on the process of subjectivation is studied. The modern technologies of mass manipulation are investigated as repressive forms of information-psychological impact on a person. It is shown that an effective way to resist the information-psychological impact on a person is to appeal to his immanent intellectual and moral foundations. Innovative technologies and practices of human subjectivation is studied. It is shown that in modern conditions, the vector of human subjectivation is oriented towards communication. The main axiological paradigms of modern discourse are dialogism and pluralization of points of view.

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POST-NEO-ROMANTICISM AS A PHENOMENON OF THE CONTEMPORARY CULTURE

Olena Kolesnyk

INTRODUCTION

The term “Romanticism” is traditionally used in two meanings. Firstly, it is the title of a cultural style, which existed in the late 18 – early 19 century. In the wider sense, Romanticism it is a trans-historical cultural phenomenon, opposing the materialistic approach to life and naturalistic artistic representation. According to N. Berdyaev, it is characteristic only for Western culture, though some parallels could be found in other cultural traditions. Sometimes it is stated that in the history of culture realistic and romantic creative methods alternate. Indeed, in European culture we can discern some rhythmic fluctuations between the cardinally different principles which F. Nietzsche’s termed “Apollonian” and “Dionysian”. In terms of K. G. Jung’s Analytic Psychology, Romanticism can be viewed as a manifestation of a visionary artistic creativity (as opposed to the rational method of “writer-psychologist”). The Romantics themselves often compared spontaneity and irrationality of creativity to the working of Nature or some super-Natural forces. In this context, the personality (microcosm) and the universe (macrocosm) are of more importance to the author than society, though the latter also has its symbolic potential.

It is customary to begin the history of romanticism (in both senses of the word) from the eighteenth century, distinguishing Pre-Romanticism, High Romanticism, and Neo-Romanticism. However, “diffuse” forms of romanticism existed both before and after its “official” time limits.

In the English-speaking tradition, Neo-Romanticism has no “upper limit” – it does not disappear, but gradually dissolves in other cultural areas of the 20 century. In the contemporary Ukrainian humanities, the existence of Neo-Romantic forms in the current culture has scientific recognition. However, this phenomenon is much more important and more diverse than just some marginal trends described separately. The Neo-Romantic tendencies of the late 20 – beginning of 21 century are reaching such a level of self-organization on a global scale, which allows us to speak no longer about individual manifestations of romantic moods, but about the cultural phenomenon of a higher order. In scale and character it is comparable with the Neo-Romanticism of the late 19 – early 20 century, and therefore deserves a separate name. We suggest it to be “Post-Neo-Romanticism”.

1. The sources and characteristics of the Post-Neo-Romanticism

Some elements of Romantic world outlook can be traced at least to Hellenistic and Roman art. I. Ratsky suggested the term “romantic genres” roughly equivalent of the English term “romance” (in the wider sense of word). According to this researcher, it is a complex conglomerate of genres, to which both the Hellenistic novel, various forms of Medieval literature, and Shakespeare’s last plays belong¹. In the contemporary Ukrainian humanities, there are instances of usage of the term “romence”. Further use of the concept is highly recommended as it implies the continuous, trans-historical tradition that connects the early (Hellenistic and Medieval) adventure stories with the Romanticism of the 18–19 century, and further with the contemporary fantasy, some sub-genres of which clearly show the same archetypal pattern as the ancient texts. The same can be said about some works of science fiction (“Star Wars” for example).

The proto-Romantic features of the Hellenistic novel include outstanding characters, shocking tribulations and exotic countries. Even in some texts that can seem anti-Romantic, we can find features, that much later would become crucial for the truly Romantic genres. For instance, in the Roman literature we see for the first time the focus on the life of a metropolis as a socially, culturally and religiously heterogeneous environment, which contributes to the marginality and anonymity of characters and to the dramatic rises and falls of their fortune. The most vivid example is Petronius’ “Satyricon”. There city becomes the integral part of the story and the only possible background for the events. Considering the contrast between the social position of the author – the “arbiter of refinement” at Emperor Nero’s court – and the “urban jungle” he depicts, we can see “Satyricon” as one of the first examples of *slumming*, typical of Neo-Romanticism. This kind of anti-glamor is being revived in our own time. In this context we can also mention the Baroque Picaresque novel, where a big city is depicted as a mysterious and dangerous environment with its complicated, multi-faceted life. It should be especially noted that the low and commonplace (namely, the life of lumpens and criminals) could be seen as exotic and even alluring.

During the Middle Ages, due to the civilizational changes, the city in the literature recedes into the background. Romances (in the proper sense of the word) return to the natural setting. Here we see the contrast between “the fortress” and “the forest/field”. The same sharply drawn opposition between “culture” and “nature” structures the world of Shakespeare’s “King Lear” that gives the summary of the generalized epic times of European

¹ Ratsky, I. (1977) The last Plays of Shakespeare and the Tradition of the Romantic Genres in Literature. Shakespearean Readings 1976. P. 104.

history. The theme of nature as a source of both danger and spiritual rebirth would become very important for the High Romanticism. Later it would reappear in some variants of the adventure genre and fantasy.

Traditional elements, including the inherited Classical topoi and the autochthonic folklore motifs, re-interpreted in the light of new, anti-Enlightenment sentiments, lead to the formation of what is now known as Pre-Romanticism. At the center of the world picture was placed not reason but passion. In our context, there are two phenomena that deserve special attention: 1) the emergence of the Gothic novel, which still has a paradigmatic significance for several genres, and 2) the emergence of Ossianism. The latter greatly influenced not only literature, but also political culture of Europe of the 18–19 centuries, and became a factor in a series of national revivals that have changed the map of Europe and the world.

The rise of the High Romanticism with its new world model meant the emergence of new genres. The notable achievements of High Romanticism were the creation of the historical genre (W. Scott and V. Hugo) and the appeal to folklore (the Grimm brothers, H. Ch. Andersen and others). For the first time, history was seen as a way of finding the origins of one's own culture. This "search for roots" was of particular importance to peoples "without history" and to peoples whose state traditions for some reason had been broken. For example, in Ukraine, where the national culture was declared non-existent by the Tsarist government, there were works that restored historical memory. It is in this context that one can consider the works of I. Kotlyarevsky and T. Shevchenko, and some works of M. Gogol.

It is usually stated that the second half of the 19 century was the time of predominance of realistic, even naturalistic literature, which has eclipsed the Romantic art, which was only revived in at the turn of the century as the Neo-Romanticism. However, the watershed between High Romanticism and Neo-Romanticism of the late 19 – early 20 centuries is not quite clear, since throughout the nineteenth century realism as a principle coexisted with romanticism. Here are some important trends:

1. In some countries – including Ukraine – romantic tendencies existed throughout the 19 century and moved to the 20 century.

2. Works of romantic nature ("Moby Dick", "The Song of Hiawatha", "The Legend of Uhlenshpigel", etc.) continued to appear in the second half of 19 century; the correlations between them and the irrationalistic philosophy deserves separate study.

3. Many notable works of art, predominantly realistic, had noticeable traits of Romanticism. Quite a typical phenomenon was the "physiological essay", where the city was regarded as an integral organism and described at the same time "scientifically" and poetically. Probably the pinnacle of such a

description of the inner life of city, related to the inner life of human soul, is found in the novels of Ch. Dickens and F. Dostoevsky.

4. During this period the ideas of High Romanticism diffused in the culture, gave rise to the new genres, such as adventure novel and its variants, primarily detective, thriller, science fiction and fantasy.

This cultural complex can be termed an “intermediate” Romanticism of the mid to late 19 century.

Adventure literature is a genre conglomerate that includes such different forms as a chivalry romance and science fiction. Most of these genres – social adventure, historical adventure, geographic adventure, detective, fantasy etc – have formed since the middle of the nineteenth century. The works of these genres often were popular and commercially successful. Some of them since then have acquired the status of classics.

The formation of the Neo-Romanticism proper took place in the 1880-s. Its British version represented by R. L. Stevenson, H. R. Haggard, A. Conan Doyle, R. Kipling, defined the canons of the classic adventure novel, solidifying the emergent genres. One of the characteristic traits of Neo-Romanticism was the ordinary, down-to-life protagonist, radically different from the “superhero” of the High Romanticism. It helped the audience to identify with the hero, and also to see the real life as wonderful and mysterious. In an extreme situations a Neo-romantic character found will and strength to win. Such stories, despite the exceptional nature of the events described in them, had close correlations in real life. Let us remember, that it was the age of the last great geographical discoveries, which the entire world followed with admiration.

Neo-romantic texts often hide behind the seeming simplicity a serious and complex content, open to a variety of interpretations. For instance, dozens of adaptations of R. L. Stevenson’s “Treasure Island” or A. Conan Doyle’s “The Hound of the Baskervilles” have not exhausted the multi-layered philosophical issues of the literary sources. On the example of Stevenson’s works, one can study a curiously actual phenomenon of fear of inner chaos, symbolized by the famous split of a person into two personae: Jekyll and Hyde. This theme is closely connected to: 1) the universal archetype of Shadow; 2) the British folk tradition of two worlds; 3) the Victorian Novel of mysteries; and 4) the popular ideas about the complex structure of the psyche, which led to the almost simultaneous discovery of the subconscious by S. Freud and I. Franko.

The theme of the hidden secret side of the world underlies the structure of the classic detective. It is characteristic that A. Conan Doyle not only created the iconic image of a detective and a paradigmatic story model, but also initiated a kind of urban epic that mythologizes London (and can be

transferred to any city). Detective and thriller (which were not very different at first and still have intermediate forms) tend to portray the modern city not only as a place of action, but also as an active medium, and even as a full-fledged hero of the story. Some cities have special charisma. One of them is London, which is not surprising, given its status as the centre of a world empire that it had at the time of the genre's inception. Other cities may be brought to the foreground by their particular geopolitical position, such as Istanbul, which became the scene of thrillers from such excellent writers as J. Buchan, T. Hayes, D. Brown, E. Kostova and O. Pamuk.

G. K. Chesterton became a theoretician and apologist for the detective genre, whose pathos is the exact opposite of the pathos of J. Ortega y Gasset. He regarded detective story as a form of myth that reveals the magical reverse of everyday life². The enchanted world of a chivalry romance is, oddly enough, compatible with the image of the modern metropolis. A fight with a criminal can turn into a spiritual quest and a triumph over sin.

One more important genre, emerging at the second half of 19 century, was literary animalistics. It was one of the first attempts to look at the world from a fundamentally different perspective. One of its derivatives is the now-popular xenofiction, which examines the non-human lifeworld. Finally, during this very period, the canon of the literary fairy-tale is emerging. It became a starting point for the fantasy genre, as well as for the European version of magical realism.

The Continental counterpart of the mostly British and American Neo-Romanticism is the Symbolism. Despite all the dissimilarity of the philosophical lyrics and the adventure novel, their basis is common: a sense of the end of an era and the search for a way out of the crisis of everyday life. If British Neo-Romantics preached the courageous willingness to take on any challenge, then the Symbolists were inclined to seek salvation from the prose of life in the transcendental. It could be religion, or the perfect world of the ethnic past. As in the period of High Romanticism, this latter variant was especially relevant for nations that had to claim their identity. The Ukrainian version of Neo-Romanticism is represented by the work of Lesya Ukrainka (who used the term "new romanticism"), and by the early poems of P. Tychna and the Neoclassics.

In the Soviet and post-Soviet critical traditions it is commonly stated that Neo-romanticism went into decline in the 1910-s. In the English-speaking tradition, Neo-romanticism has no upper limit: it includes all works that oppose naturalism on the one hand and avant-gardism on the other. Given the

² Chesterton, G. K. (2020, January 07). A Defence of Detective Stories. Retrieved from <https://www.chesterton.org/a-defence-of-detective-stories/>

historical context, the upper limit of the “classical” Neo-Romanticism is 1914. The collapse of empires, the revolution in Russia, the terrible losses on the fronts, the general mood of despair and disappointment could not but lead to radical changes in the way of life and type of culture. Therefore, although after the First World War there were still some texts, clearly Neo-romantic in the spirit (such as thrillers of J. Buchan), the literature of a completely different nature came to the fore.

After the First World War, romanticism did not disappear, but transformed. In 20 century Romantic tendencies were quite strong but diffuse, and thus seldom viewed as a whole phenomenon. Depending on the predominant ideology and the personal inclinations of the author, Romantic sentiments could lead both to the revolutionary urge, or to the complete escapism. Because of such great ideological and stylistical diversity, it is difficult to give it a specific name and definition, so let us call it “the 20 century romantic trends”. Taken together, they occupy a significant place in the culture, but do not form a particular school with clear agenda or stylistic unity. This heterogeneous complex of texts is united by their rejection of the commonplace. In the period between the world wars, appeared significant texts without direct genre analogues (“Master and Margarita” by M. Bulgakov), or texts that have laid the foundations of a genre that would develop only in a few decades (“The Hobbit” by J. R. R. Tolkien). However, on the whole, romanticism does not dominate.

The new revival of the romantic tendencies started after the Second World War, in the period of reflection on the losses and the search for a way out of spiritual paralysis. This function was originally performed by the genre of fantasy and philosophical fairy tale before its transformation into a form of escapism. Another fantasy variant, continuing the tradition of Kipling’s “Puck of Pook’s Hill” aims at reconstructing the ancestral and national heritage at the micro-historical level.

Romantic tendencies played significant role in the Soviet culture; it is known that the term “revolutionary romanticism” was proposed as an alternative to “socialist realism”. The romantic in the USSR took form of striving for revolutionary, labour and creative achievements. Unlike most romantic traditions, here the personality does not oppose the community and the state. On the contrary, the extraordinary and mysterious forms an attractive shell of the socially useful. However, even within such a strict canon, there were extraordinary works. In addition, there were some texts and even whole trends going beyond the limits of the Socialist Realism, such as in Ukrainian “chimerical novel” (O. Ilchenko etc.).

The classic Neo-Romantic literature retained its popularity throughout 20 century. These books still have enormous international audience, and

moreover, they are constantly re-interpreted both in screen adaptations and in the new works of art that use their imagery and structure. This widespread and multifaceted process is rapidly turning into a phenomenon of contemporary art, which can be defined as the “Post-Neo-Romanticism”. This term, if somewhat unwieldy, refers to its connection with the Neo-Romanticism (rather than the High Romanticism), and its liberal use of the Post-modern devices. For example, the Neo-Romantic texts can be modernized, combined, or interpreted in terms of retro-futurism, that give rise to Steampunk and suchlike forms. The new trend can be traced to the times of the collapse of the Soviet Union and the consequent structural changes of the global culture. Now it is becoming a noticeable factor of the current cultural life in the post-Soviet space, Europe, North America and the Far East.

The most notable feature of the Post-Neo-Romanticism is the replication of the Neo-Romantic pattern: a person gets into an extreme situation that requires him/her to reach the full potential. The overall tone becomes somewhat gloomier than in the 19 century, as both authors and readers know full well the horrors of the outer and inner worlds. Recognizing Hyde’s presence in each person leads to the replacement of hero with an antihero. However, these tendencies are not purely negative, since the main message of the text may be in finding true values and new ways of person’s integration into society.

Another feature of the trend is hyperbolization, which sometimes reaches the limit of parody and self-parody. The contemporary recipient is not easy to impress. Therefore, authors use the whole arsenal of means of emotional influence.

If Neo-Romanticism created genre canons, then its contemporary version tends to inter-genre synthesis. In particular, fantasy elements are widely introduced into the mainstream literature. Another trend is experimenting with the content and form of works. In Post-Neo-Romanticism, a set of Postmodern guidelines and techniques – polyphony, nonlinearity and deconstruction of the text, widespread use of quotations and allusions – is involved in modelling works based on Neo-Romantic literature. Very often contemporary writers directly refer to the iconic works of British Neo-Romanticism, using Postmodernist approach.

Generally, the contemporary interpretation of the Neo-Romantic texts may aim at:

- adequate reproduction (adaptation, illustration, creation of comic books based on books, etc.);
- modernization (“Sherlock” series, where the action takes place in the 21 century);
- concentration of characters of several works in one intertext (“The League of the Extraordinary Gentlemen” comics and film);

- creation of historical fantasy, steampunk, crypto-, alternative- and pseudo-historical works based on their motives;
- use of typical Neo-Romantic plot elements or even a whole story, transferred to our own times (for example, N. Gaiman’s “Neverwhere” repeats the structure of “The Lost World” by A. Conan Doyle).

One of the typical traits of the best examples of the Post-Neo-Romantic literature is the interest to the hierophany of the secret meaning of everyday life. A rebellion against the rationalization of the magical we see in T. Burton’s “Sleepy Hollow” and T. Gilliam’s “Brothers Grimm”, which completely reimagine their literary primary sources. In S. Clarke’s “Jonathan Strange and Mr. Norrell” the dangerous but vital element of magic (and its correlates: folk, female, subconscious, etc.) interferes with an overly-orderly life. Historical genres are increasingly being replaced by various “pseudo-historical” variants, in particular in the form of time-punk and other variants of “alternative”.

The interest in the second half of the 19 century is growing. Even in genre-pure fantasy, there is a noticeable departure from the “Tolkien” to the “gaslight” entourage. Such forms are most characteristic of British literature, however, elements of steampunk are noticeable in other countries as well; some motives are seen in Ukrainian literature (L. Luzina).

The Victorian era (and its counterparts in other countries) is depicted as ambivalent. The critique of disempowerment, gender inequality, colonialism, environmental problems, spiritual crisis, and dehumanization are combined with palpable nostalgia. The axiological accents of particular works depend largely on the author and the target audience (male or female, adult or teenage).

Post-Neo-Romanticism is characterized by a kind of anti-glamor. For example, the poetics of steampunk implies the dirt, smog and rust of a big city. However, it is not about democracy or the revisionist “truth of life”. Poetization of poor suburbs, landfills and sewers cannot be called a new phenomenon (remember the 19 century concept of *slumming*), but in modern art it reaches its limits.

One of its most shocking manifestations is necro-aesthetics, noticeable in both elitist and popular culture (glamorous vampires, variations on the Frankenstein monster, completely non-folk zombies, etc.). It is a complex phenomenon, but one of its aspects is the mythologization of the rejected. The idea of mysterious independent life of inanimate objects leads to the possibility of perceiving the dump as a “concentrate of spirit” – as in the scenery of the famous musical “Cats”. The dump and the museum are interchangeable: the museum can be seen as a collection of “magnificent, rare, strange and expensive junk”³, and the dump – as a source of ideas and

³ Gaiman, N. (2005) *Neverwhere*. London, Great Britain: Headline. P. 173.

materials for museum installations. The lives of declassified elements, the non-life of dead bodies, and the existence of non-animated objects all can be comparable in their marginality. The ghetto, the madhouse, the shelter, the cemetery, the landfill are all in one semantic row.

N. Gaiman in “Neverwhere” created the complete myth of this shadow world. The storyline of the novel turns inside out a stereotypical Hollywood plot. Instead of a loser who has been initiated and returns home with new strengths and perspectives, we see a person who escapes from his own success back to the “hyper-slums” – the only place where he can find real life and real feelings.

In general, Post-Neo-Romanticism is critical towards political, economic and social realities. However, the rebellious image can be easily commercialized. As in the times of High Romanticism, a wind-blown cloak and dishevelled hair have become fashionable attributes, so now imitation of rags can be part of a rather expensive image.

In any case, the new trend is actively transcending the art, often determining the self-identification of his adherent, which manifests itself in real-life image and behaviour. This is evident from such phenomena as: varieties of the Gothic subculture, Tolkienism, role-playing games, historical reconstructions, etc. In spite of theoretical differences, some of these trends can easily combine, creating an alternative reality of life.

2. Guy Ritchie’s “Sherlock Holmes” dylogy as a quintessence of Post-Neo-Romanticism

G. Ritchie’s “Sherlock Holmes” films (as well as the “Sherlock” series, which appeared almost simultaneously), radically differ from all previous adaptations of A. Conan Doyle’s stories.

One of the most noticeable tendencies of the contemporary culture is the fluidity of the borders between the art and science, the image and the theory. Sometimes the artists are the first to notice, or at least, to draw attention to some serious problem. In that way, Guy Ritchie’s film “Sherlock Holmes” (2009) and its sequel “Sherlock Holmes: A Game of Shadows” (2011) have a diagnostic quality, as they not only present the in-depth analysis of the late XIX – early XX ct., but also warn the recipient about the dangers of the contemporary politics.

Sherlock Holmes is one of the eternal characters, which have acquired a kind of independence from their authors and transcended the limits of time and space. Still, his personality is quite definite, and the totality of Arthur Conan Doyle’s detective stories has been defined as “the Canon”. That is why all the numerous artistic interpretations of the character and the story (screen adaptations, literary sequels etc.) can be roughly divided into two types:

1. The interpreter aims at achieving the maximal “correctness”, trying to make every detail historically accurate and true to the literary source;

2. The interpreter sees Conan Doyle's stories only as the starting-point for their own imagination.

It is clear, that interpretations of the second type can be quite distant from the original. However, choosing the first strategy also does not guarantee the congeniality of the new work of art and the classical stories. The main cause of the discrepancy is the absence of the surprise element for the recipient. For their first readers, Conan Doyle's stories were vibrantly relevant in their problematics, thrilling in their suspense and unpredictability. Now this thrill is considerably dulled, because it is hard to find an adult person, who does not know the final of most stories. Therefore, the screenwriters try to go away from the original stories with their predictable finals and explore the unknown.

Guy Ritchie's two films are somewhere in between the two abovementioned types. The stories were completely rewritten. Nevertheless, the depiction of Sherlock Holmes's world, the general atmosphere, the stylistics and the rhythm are remarkably true to the original. The author made the instauration of the character and plot, clearing away the accumulation of the stereotypes but retaining the "hard core" of the Canon.

The screenwriter's task was to write a new story, greatly upscaling the events but maximally using all the original Conan Doyle's material. Just one example. Since the times of Chekhov, we know that a rifle hanging on the wall, must fire eventually. For Conan Doyle, the Detective's smoking-pipe could be just an accessory. In the contemporary art, every object must work, and the pipe works hard, turning into a tool for bomb defusing, an instrument of fire diversion in the auction hall etc. In that way the writer and the director take what is already present in the original stories and "blow it up".

It is interesting – even symptomatic – that at the same time a different team used much the same principles when creating "Sherlock" series. In both films, we see explication of subtexts, heightening the emotional score, visualization of the individual process of thinking and different mind games etc. Very noticeable are the protagonist's incomprehensible actions that demand the *leap of faith* from other characters as well as from the recipient. The contemporary setting of "Sherlock" not only heightened the spectators' emotional engagement, but also created the effect of the "stereoscopic vision" of history. Sometimes we can see how much the world changed. And on the contrary, some problems remain: almost 150 years later Watson again returns from Afghanistan.

Still, the implicit philosophical basis of Ritchie's films is even more complex.

It is evident, that the contemporary filmgoer is used to the maximal scale of the conflict and its impact. Such an attitude is quite different from the

paradigm of the classical crime story, where the focal point is the complicated riddle that must be ingeniously solved. It does not mean that the detective is indifferent to the ethical and social problems. G. K. Chesterton was one of the first to state that one of the main functions of the classical detective was to demonstrate the triumph of justice, and thus – triumph of Cosmos of the destructive forces of Chaos. Much later, K. Summerscale concluded, that detective story takes reader into the mystery of death and rebirth⁴. Taking into consideration the experience of the XX ct., D. Kluger showed the transformations of the detective genre, sometimes leading to the triumph of Chaos⁵. However, G. Ritchie chose to retain the traditional, much more optimistic, approach.

Strictly speaking, the structure of both Ritchie's "Sherlock Holmes" films is much closer to thriller, than to the classical detective. Detective's main point is in solving the already committed crime, in other words, in uncovering the secret of the past. Thriller in the modern sense of the term has appeared in the early 20 century, though its elements can be seen in earlier works, significantly, in Conan Doyle's "The Hound of the Baskervilles". While detective deals with the question "how it was done?" thriller – with "what will happen?" Often the protagonist is a more or less innocent bystander, caught in the stream of events and bound to fight for his life. Besides the duel with the forces of evil, the protagonist is often on the wrong side of the law, which complicates the game. Such a situation where a gentlemen's reputation was smirched, even temporarily, was not typical for the Victorian literature. However, since J. Buchan's "The Thirty-nine Steps" the plot where the hero evades both criminals and the police has become a staple.

In the second half of the 20 century, appeared a new sub-genre of thriller, where a brilliant and devious criminal forces a defender of the law to accept a kind of chess game. Mostly, such a game is initiated by a maniac. Ritchie's plot is more interesting, because both players are quite sane, though highly unusual personalities. In "A Game of Shadows" Ritchie turns this *agon* into the leitmotif of the whole story. In both films, we see the intellectual duel of almost equal participants, which creates powerful suspense.

It is clear, that in both stories Sherlock Holmes is defending the Cosmos and the principle of order and justice (though not necessarily the law). It seems only natural that his enemy must represent Chaos. But it is true only in the second film "Sherlock Holmes: A Game of Shadows", where appears the

⁴ Summerscale, K. (2008) *The Suspicions of Mr. Whicher, or The Murder at Road Hill House*. London, Great Britain: Bloomsbury.

⁵ Kluger, D. (2005). *The Baskerville Mystery: The History of the Classical Detective*. Moscow: Text [in Russian].

notorious Professor Moriarty. The villain of the first film is quite different. He also “plays for” Cosmos, only his version of the world order is a wrong one.

It is difficult to say whether the author planned his two films as the development of the same historiosophic theme. But we see clear and complete depiction of two different “crime paradigms”: “classical” and “non-classical”, or the totalitarian and the anarchic.

In the first film, “Sherlock Holmes”, the hero’s archenemy is the Lord Blackwood, rich and privileged, though – significantly – illegitimate. He combines his wealth, social standing and intellectual resource to seize the power in the country.

Here we can find many features, typical for the second half of the XIX ct., which combined the ancient tradition with the search for the new ways of thinking and acting. The antagonist is a representative of the ancient elite, who believes in his hereditary right to rule. At the same time, he wants to twist the already existing ancient institutions – from with the Masonic-like lodge to the Parliament – to suit his purposes. It is typical, that he searches to “marry” the occult lore with the latest scientific achievements. Such things were attempted in these times, and much later. One of the notable examples is Hitler’s Ahnenerbe, a mysterious institution that collected and studied all the kinds of ancient lore for possible practical use. Some studies that try to establish the correlation between myth and science take place in our own time.

Guy Ritchie does not show these arcane experiments to be effective. Mostly, they serve to create the atmosphere of awe. Fear becomes a force in itself, helping to demoralize the opponents and oppress their minds. In such an atmosphere *coup d’états* becomes a possibility. Blackwood does not mean to destroy the state – he wants to seize it and change it according to his plans. No doubt, he would have turned it into an extremely right-wing hierarchical totalitarian world-state embracing both Britain and Northern America.

Blackwood’s Dracula-like image, his quasi-religious terminology, his usage of some very antique occult tradition have an archaic feel. In a way, he is a throwback. But that is not all. Both his scientific achievements and his ability to manipulate the public opinion are shown to be effective.

A plot to seize the power in a state is not typical for the 19 century fiction. The existing order seemed too strong to think of that. Only the XX ct. with its experience of revolutions, world wars, coups and dictatorships, brought into the focus of attention stories about the charismatic leaders turning tyrants. John Buchan was one of the first to notice this tendency of “domination of spirit upon spirit”⁶, whether openly leading the masses, or covertly

⁶ Buchan, J. (2010) *The Three Hostages*. The Complete Richard Hannay Stories. London, Great Britain: Wordsworth Classics. P. 678.

manipulating them. In that way, when we recollect Lenin and Hitler's unpredictable rise to incredible power, the plot of the film goes far beyond the 19 century.

The second film, "Sherlock Holmes: A Game of Shadows", presents quite a different paradigm, even a different age. If Blackwood only experimented with the new technologies, there we see the coming of the mass production. Unfortunately, it is the mass production of the instruments of the mass murder. Moreover, there is a hint that this mass-production can be used to standardize human beings. Plastic surgery, "making" twins is just one example.

Professor Moriarty is not the embodiment of Chaos – after all, he is a mathematician and music-lover, which refers us to the Pythagorean notion of the cosmic harmony. Still, he does the work of Chaos, because his course is pure destruction without a hint of any new order.

Everybody knows that Professor Moriarty is the arch-villain of "Sherlock Holmes" stories. But he never appears in the spotlight. In the book, Watson does not see him at all, and knows only Holmes' brief description of his enemy's character and activity. Paradoxally, we do not even know Moriarty's name. It is supposed to be James, but actually, it is the name of Professor's brother. In a story, such a veil of mystery is good, but in the screen adaptation, "the Napoleon of Crime" must have a real and impressive presence and convincing psychological motifs.

Guy Ritchie brilliantly explained his character's peculiar combination of order and disorder. It is all in the title of Moriarty's monograph about the deviations of asteroids. This theme wakes in mind the discussion of Classical Greek and Roman philosophers, dealing with the trajectories of atoms, whether strictly deterministic (Democritus) or having a degree of freedom (Lucretius). However, for Moriarty this deceptive "freedom" becomes the source of catastrophes that from time to time burst the order of Cosmos. It is a convenient creed for him, for it combines the belief in the mathematically precise mechanism of the Universe, and the inevitability of periodical cataclysms in the work of this mechanism. If these cataclysms are natural and inevitable, it seems no great crime to produce one. Moreover, in such cosmic incidents, the collateral damage is inevitable and of no importance. This peculiar combination of fatalism and freedom of will is sufficient to justify any crime.

It is remarkable, that the story begins with the anarchist bombers, which is strictly in keeping with the historical truth. The turn of the centuries was the time of many ideologies, some of which become violent. However, later we see that these terrorist attacks were orchestrated by a person with no ideology at all. He is the *tertius gaudens*, who provokes the revolutionaries and the

states to receive maximum gain. He cares about no one, and he does not belong to a certain country. That is why all the states can ruin themselves as long as he has a neutral enclave to enjoy his gains. It is quite close to the alleged position of the contemporary “international elite”, whose worldwide mobility means that they are free to exploit and leave any country, having no loyalty to any people or any state. This new elite is not the aristocracy of old. They have no “origin”, no lineage, and no motherland – just personal abilities that allow making money.

Such actions provoke different kinds of conflicts, which can turn into a full-scale war. We all have grown with the knowledge that the world wars are quite real. However, in the 19 century such a thing appeared quite unthinkable. That is why Holmes, who has no illusions about Moriarty’s intentions, is ahead of his time. It is clearly seen in his usage of the formula “the fate of the Western civilization”. The civilizational approach in his time was marginal; it was much later that Spengler’s “*Der Untergang des Abendlandes*” popularized the conception. The term “Western civilization” is younger still. Thus, Guy Ritchie hints to the spectator that Holmes uses the contemporary historiosophic categories. He can see the future.

In the first film, the action is confined to London. In the second, significantly using not only train and steamer, but also the latest invention – automobile – the heroes go abroad and see different countries in their interaction. Every state is characterized by its most prominent features. For example for France, it is revolutionaries, good wine, international summits, the unfinished Eiffel tower and the Opera. For Germany, it is a military factory.

Britain, France, Germany would become active participants in the forthcoming two world wars; Switzerland in both cases would manage to stay neutral. All this is foreshadowed in the plot, and the spectator has a kind of sad knowledge of the inevitable future events. For example, for the 19 century Britons Switzerland was beautiful and exotic but rather unimportant. In the 20 century, it became a symbol of neutrality, with all its positive and negative connotations. Combining these senses, Guy Ritchie gives the fatal Reichenbach Falls the completely new semantics.

Another theme seen in “A Game of Shadows” is the borders between the states, and the way to transcend these borders – both geographical and mental. In this way, mobile gypsies are of more help to the “concerned citizens” trying to prevent the collapse of the civilization, than their own bigoted governments. On the other hand, the crime lords are also no longer confined to one state. War and terrorism also become global. Unfortunately, this is all too true now.

Guy Ritchie shows two seemingly diametrically opposing but equally unacceptable ways of behaviour. When openly practiced, they are qualified as criminal, but in their more covert form, they have a place on the margin of political forces.

The first of them is right-wing, based on the strict hierarchy and rigid order, that establishes the dictatorial world-state, based on deception and fear. The second one is anarchic, or, at least, using the revolutionary rhetoric for its own aims. The provocations, that may lead to the world war, are used to enrich a certain person who stays in a neutral country. The difference between their principles can be summarized as follows:

| <i>Sherlock Holmes</i> | <i>Sherlock Holmes: A Game of Shadows</i> |
|--------------------------|---|
| Cosmos in a twisted form | Chaos |
| Traditions of state | Destruction of all traditional order |
| Open power, hierarchy | Hidden control |
| Giving orders | Making provocations |
| Totalitarianism | Anarchy |

Unfortunately, both these tendencies – extreme fundamentalism and self-centered anarchism – in ideology and politics are still with us. Guy Ritchie’s films visualize the twin dangers that must be avoided, heightening the recipients’ awareness of the world problems.

CONCLUSIONS

Romanticism as a general cultural trend has a trans-historical quality. In different epochs, it manifested itself in different art forms and genres. The current trend can be defined as Post-Neo-Romanticism, as it combines numerous references to the Neo-Romantic paradigm with Postmodernist interpretational techniques. Here Neo-Romanticism appears in a recognizable but hypertrophied form (“hyperromanticism”), often with shifted emphasis or transformed genre system. Having a set of characteristics, Post-Neo-Romanticism can have a wide range of specific forms depending on the type and genre of art, national tradition, target audience, etc. The development of a classification of its variants deserves a separate study.

Post-Neo-Romanticism tends to mid-cult, and its significant works are semantically multi-layered. For instance, the form of the classical detective can be used to express the contemporary author’s view on the history of the major world problems and their current state. For instance, Guy Ritchie’s “Sherlock Holmes” dylogy can be seen as a complete historiosophical research in the artistic form.

Post-Neo-Romanticism as a large-scale mindset emerged spontaneously as a reaction to the ideological and aesthetic demands of a large part of modern society. Numerous works of art, and whole forms and genres tending to this cultural complex are well known in the contemporary Cultural Studies. However, we see them as a complete new cultural phenomenon. Its further study would help to understand: 1) the subtexts of the specific forms, taken in a larger cultural context; 2) the current state and perspectives of the contemporary culture in search of a new “big style” to follow Postmodernism.

SUMMARY

The article deals with the contemporary culture phenomenon, which is defined as “Post-Neo-Romanticism”. It is a wide trend that unites non-naturalistic and non-modernistic tendencies, which are manifested in different popular genres of literature, cinema and other artistic forms. This trend is actively transcending the art, often determining the self-identification of his adherent, which manifests itself in real-life image and behaviour. One of the important characteristics is the large-scale appropriation of characters, plots and entourage of the classical Neo-Romanticism, which is often interpreted with the use of Postmodern techniques. Another feature is hyperbolization, which sometimes reaches the limit of parody and self-parody. If Neo-Romanticism created genre canons, then its contemporary version tends to inter-genre synthesis. In particular, fantasy elements are widely introduced into the mainstream literature. One of the best examples of Post-Neo-Romanticism is G. Ritchie’s “Sherlock Holmes” dylogy, which illustrates such typical features of this trend as re-working of the classical literary source, double coding, combination of the action-driven plot with the philosophical (especially – historiosophical) subtexts. As Post-Neo-Romanticism is a new cultural phenomenon, gaining in strength and continually embracing new spheres of culture, its character and tendencies deserve further study.

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ANCIENT ROMAN OTIUM AS A CULTURAL PRACTICE AND THEORETICAL REFLECTION

Iryna Petrova

INTRODUCTION

Leisure is an important life-forming component of a modern society, because it reflects the characteristics of social relations, class stratification, the development of productive forces, ideology, religious beliefs and moral norms. In this context, the analysis of the driving forces and sources of the historical and cultural process is extremely important, in particular, the reconstruction of ideas about ancient Roman leisure activity as a cultural practice and a polysemantic cultural phenomenon.

The disclosing of the ancient Roman leisure practices implemented with the involvement of Strabon's geographical descriptions¹, Ovidius's poetry², Velleius Paterculus³, Titus Livius Lucius⁴, Claudius Cassius Dio Cocceianus's historical works⁵, Marcus Valerius Martialis's epigrams⁶, Gaius Cornelius Tacitus's annals⁷, Gaius Suetonius Tranquillus⁸ and Plutarch's biographies⁹, in the works which reflect the diversity of the types of cultural practices of the Roman.

About otium intelligent and otium entertaining as the opposition of individual and collective leisure activities there could be read in the Publius

¹Strabon. (1964). *Geografiya v 17 knigakh*. (G. A. Stratanovskiy, trans.; S. L. Utchenko, ed). M.: Nauka. 941 s. (in Russian).

²Ovidiy, P.N. (1999). *Lyubovni elegii. Mistetstvo kokhannya. Skorbotni elegii* (A. Sodomora, Trans.). Kyiv: Osnovi (in Ukrainian).

³Nemirovskiy, A. (Eds.). (1995). *Malye rimskie istoriki. Velley Paterkul. Rimskaya istoriya. Anney Flor. Dve knigi Rimskikh voyn. Lutsiy Ampeliy. Pamyatnaya knizhitsa*. M.: Ladomir (in Russian).

⁴Liviy, Tit. (1989). *Istoriya Rima ot osnovaniya goroda: v III tomakh*. (M. L. Gasparova & G. S. Knabe, Ed.). M.: Nauka (in Russian).

⁵Kassiy Dion Kokkeyyan. (2013). *Istoriya kesarey. Knigi LVII-LXIII "Istorii rimlyan"* (V. N. Talakha & S. A. Kuprienko, Ed.). Kyiv: Vidavets Kuprienko S. A. (in Ukrainian).

⁶Martial (2000). *Epigrammy*. (F. Petrovskiy, Trans). Kharkov: Folio; Moscow: AST (in Russian).

⁷Tatsit, P. K. (2001). *Annaly; Malye proizvedeniya. Istoriya [per. s lat.]*. Moscow: AST; Ladomir (in Russian). (in Russian).

⁸Svetoniy. (1993). *Zhizn dvenadsati tsezarey*. (M. Gasparov, Trans). Moscow: Nauka (in Russian).

⁹Plutarkh, M. (1961). *Sravnitelnye zhizneopisaniya*. (M. Grabar-Passek, ed.). Moscow: Akademiya nauk SSSR, pp. 382-407 (in Russian).

Vergilius Maro¹⁰, Quintus Horatius Flaccus's poems¹¹, Gaius Plinius Caecilius Secundus's¹² the Young letters, Gaius Sallustius Crispus' works¹³, numerous laws on luxury. Discussions as for the devaluation of spiritual leisure activity values and the reduction of leisure activity to a state of idleness are analyzed on the basis of Tacitus's works¹⁴ and Gaius Plinius Caecilius Secundus's the Young letters¹⁵.

Conceptual studies of the ancient leisure activities contain studies of foreign scientists Z. Papakonstantinou¹⁶, D. Balsdon and J.P. Vyvian¹⁷, E.K. Gazda and J.R. Clarke¹⁸, J.N. Rober¹⁹, J. Pieper²⁰ and others. At the same time, the problem of functioning of leisure activity in ancient Rome remains without attention and scientific interest of domestic scientists, in particular, there exists contradiction between expediency on the account of ancient achievements in modern culture of leisure activity that would allow to mobilize historical and cultural experience of an era of the ancient Rome for the enrichment of leisure activity as a cultural phenomenon. This problem is of great importance partly due to the lack of scientific research in theoretical and historical trends.

That's why, the aim of our research is to analyze the ancient Roman leisure activities as a theoretical reflection and cultural practice.

1. Ancient Roman otium as a theoretical reflection

The spiritual transformations in the ancient Rome, changes in values-based relations ("public affairs – leisure"), public opinion and sentiments were more expressed in the life and work of Cicero. The moral consciousness of the

¹⁰ Vergiliy. (1968) Georgiki. Antichna literatura: khrestomatiya. (O. Biletskiy, Ed.). Kyiv: Radyanska Shkola, pp. 433–437 (in Ukrainian).

¹¹ Goratsiy. (1982). Tvorii. (A. Sodomori, Trans). Kyiv: Dnipro (in Ukrainian).

¹² Pliniy, Ml. (1950). Pisma Pliniya Mladshogo. (A. Dovatur, Trans). Moscow-Leningrad: Nauka (in Russian).

¹³ Sallyustiy. (1981). Sochineniya. (V. O. Gorenshteyna, trans.). Moscow: Nauka, 1981. 220 s. (in Russian).

¹⁴ Tatsit, P. K. (2001). Annaly; Malye proizvedeniya. Istoriya [per. s lat.]. Moscow: AST; Ladomir (in Russian). (in Russian).

¹⁵ Pliniy, Ml. (1950). Pisma Pliniya Mladshogo. (A. Dovatur, Trans). Moscow-Leningrad: Nauka (in Russian).

¹⁶ Papakonstantinou Z. Work and Leisure // A Cultural History of Work in Antiquity. London: Bloomsbury Academic, 2019. URL: <https://www.academia.edu/37801972>.

¹⁷ Balsdon D., Vyvian J.P. Life and leisure in ancient Rome. Phoenix, 2002. 463 c.

¹⁸ Gazda E. K., Clarke J.R. Leisure and Luxury in the Age of Nero: The Villas of Oplontis Near Pompeii. Kelsey Museum Publication, 2016. 288 p.

¹⁹ Rober Zh.-N. (2004). Rozhdenie roskoshi: Drevniy Rim v pogone za moody. Moscow: Novoe literaturnoe obozrenie (in Russian).

²⁰ Pieper J. Leisure the Basis of Culture. Hardcover-Black & White, 2010. 158 p.

Romans of this time had a special structure, clearly reflecting social contradictions, intense political struggle, duality and conflict of value systems. If the grandfathers of Cicero's generation have not yet perceived themselves as autonomous individuals separated from the community and responsible for the moral content of their social behavior, then their descendants, Cicero's contemporaries, no longer doubted that moral responsibility had a personal character, because they had survived the destruction of policy system of values, spiritual experience of late stoicism, anti-Christian sentiments.

For Cicero, as a passionate supporter of the old Roman ideal of the *vir bonus* policy, the content of "negotium" is conditioned by the duties of a law abiding citizen with regard to *res publica*: after all, the homeland raised citizens to have some support from them and not to serve their convenience and create a safe shelter in leisure life and a quiet place to relax. Therefore, recreation leisure and contemplative leisure (*otium*) were perceived by Cicero as secondary as compared with active political activity, and as positive – only in the context of "civil peace". The thinker understood the social and political significance of leisure and its consequences in society. In particular, he condemned building of theaters, porticos and new temples, as well as entertaining battles and numerous violent scenes bringing only exhaustion and not a real pleasure, condemned luxury cost prohibitive games intended to impress the crowd. Cicero described them as it was made by Seneca one hundred years later: idle leisure can have detrimental consequences for both the individual and the entire state. Publius Servilius Rullus, tribune of the people, in his speech on the land law mentioned the ancestors who defeated the proud Campanians, providing them with "idle leisure", and this led to moral degradation and loss of independence of Capua²¹.

At the same time, "how happy is the Person who can say about himself what, as Cato wrote, my grandfather Publius Africanus said. And he said that he was never less alone than when alone, nor less at leisure than when at leisure"²². Cicero's leisure is inseparable from mental activities and deep reflections. Only literature that "educates us in youth, entertains us in old age, is decoration in happiness, solace in misery, comforts us at home, does no harm in foreign countries, spends the night with us, travels with us, lives with us in the countryside provides a real pleasure"²³.

²¹ Cicero M.T. *De Lege Agraria Contra Rullum* / Marcus Tullius Cicero [Electronic resource]. URL: www.ae-lib.org.ua/texts-c/cicero_de_lege_agraria_lt.htm.

²²Ciceron, M. T. (1998). *Pro derzhavu. Pro zakony. Pro pryrodu boghiv*. K.: Osnovy. S. 42-43. (in Ukrainian).

²³Tsitseron, M. T. (1962). *Rech' v zashchitu poeta Avla Litsiniya Arkhiya. Rechi v dvukh tomakh*. T. 2. *Gody 62-43 do n.e.* (V. O. Gorenshcheyn & M. E. Grabar'-Passek, ed.). M.: AN SRSR. S. 38. (in Russian).

Therefore, the thinker recognizes that only otium cognitive is useful for the state, because cognitive activity has state interests. And "... a wise man should not neglect knowledge of public affairs, because he should master all that he does not know, but that he may ever need"²⁴.

Cicero argued that philosophy and literature should not only fill in the leisure (otium) of the educated Roman, but also be a criterion for evaluating state activity (negotium). For Cicero, otium cum dignitate was an attempt to return to leisure its spiritual content and the "supremacy" that it lost in the Roman state, an attempt to reconcile personal pleasure and social necessity, an effort to synthesize Greek and Roman beginnings, "contemplative life" and "active life". R. Stebbins believes that Cicero, when putting forward the slogan "otium cum dignitate", meant exactly those distinctive features giving the right to identify a person with a "chosen" segment of population²⁵.

Comparing the value and priority of public activity and leisure filled with literary and scientific activities, Cicero concluded that public duties are more in line with nature than duties resulted from cognition, and ultimately, the cognitive activity is a matter of state interest. This idea will be powerful in the future – leisure for study of sciences is useful for the state. The loss of res publica as an object of serving viri boni ("good person") was considered a condition (as a compulsory necessity) and justification for philosophical (literary) leisure. Although such a situation, according to Cicero, is an exception, but in his own life it has happened repeatedly, as confirmed by the works of Plutarch, who notes that after change of the republican system to a monarchical one, Cicero withdrew from public affairs and devoted his leisure to the sons of the most noble and influential citizens wishing to study philosophy... His main occupation was to write and translate philosophical dialogues, as well as to reproduce the terms in the sphere of dialectics and physics in Latin... His versification skills Cicero used for entertainment. Living mostly in his estate near Tuscula, Cicero wrote to his friends that he lived the life of Laertes²⁶.

According to Cicero, the ideal state is Rome, in which there is a happy balance, relative harmony and unity of all its components, and the service to the state and civic valor is the basis of activity of the citizen. In the years of his consulate Cicero promised the Roman people the major benefits: peace, calm and leisure ("Ex quo intellegi, Quirites, potest nihil esse tam populare

²⁴ Ciceron, M. T. (1998). Pro derzhavu. Pro zakony. Pro pryrodu boghiv. K.: Osnovy. S. 34. (in Ukrainian).

²⁵ Stebbins, R. A. (2000). Svobodnoe vremya: k optimal'nomu stilyu dosuga: (Vzglyad iz Kanady) // Sotsiologicheskie issledovaniya. № 7. S. 64-72. (in Russian).

²⁶ Plutarkh, M. (1961). Sravnitelnye zhizneopisaniya. (M. Grabar-Passek, ed.). Moscow: Akademiya nauk SSSR, P. 316–377 (in Russian).

quam id quod ego vobis in hunc annum consul popularis adfero, pacem, tranquillitatem, otium”²⁷.

It is quite logical that a wise state ruler was considered by a philosopher to be a public figure able to provide the state with otium cum dignitate by preserving the traditional institutions. And, accordingly, the leisure can be positive only in the case of “civil peace” or as a result of “honorable retirement due to old age” – otium cum dignitate. This expression was set and is preserved in the language of European countries in the sense of “resignation from public affairs; leisure dedicated to science, literature and arts”.

Cicero, born in the 90s-80s BC, attached a great importance not to public affairs, but personal ones: friendship, scientific activities, love and poetical delight. Such a transformation of views was facilitated by the spiritual crisis of Rome of the Civil War-era, loss of old ideals and intense search for new ones, uncertainty about the future, fear of gods and the future.

Sallustius, contemporary of Cicero, who at first convinced that only a person who cares about public activity, seeking good support among the public, about his valiant actions, rather than live abundantly and lounge, witnessed the rapid social transformations during the transition period (from the republic to the principate). However, not quite successful political activity of Sallustius led to the fact that he, being out of state affairs, devoted his leisure activities to history. Condemning the leisure spent on agriculture and hunting (duties of slaves), kayaking and idleness (peculiar to corrupted people), Sallustius was convinced that representation of historical events could be a kind of continuation of political activity. Therefore, he considered his literary hobbies socially significant: “The state will benefit from my leisure more than from the activities of many others”²⁸.

In imperial Rome, the idea of stoicism became widespread: aimed at respecting the virtue, they met the Roman traditions. The doctrine of leisure of Lucius Annaeus Seneca was one of the most influential in Rome at the era of the empire. The thinker advised to live “according to nature”, to contemplate what God created, to understand own needs due to own safety, modesty, courage, rejection of glory, wealth, power and high positions. The prize of life that is the “life in leisure” can be achieved by reading, reflecting on good and evil, communicating with friends, “feeding the mind” with new knowledge, “digesting” it, that is, absorbing it with soul and mind.

²⁷Cicero M.T. De Lege Agraria Contra Rullum / Marcus Tullius Cicero [Electronic resource]. URL: www.ae-lib.org.ua/texts-c/cicero_de_lege_agraria__lt.htm.

²⁸ Sallustiy. (1981). Sochineniya. (V. O. Gorenshteyna, trans.). Moscow: Nauka, 1981. S. 41. (in Russian).

The main point in Seneca's works was affirmation of active or leisure (contemplative) life. His views on the problem have changed throughout his life: from prioritizing leisure in human life ("On the Shortness of Life") to active social position, which is a "true field of virtue" ("Peace of Mind") and the ability to combine practical life with contemplative life, if the "wise man" wants or needs so ("On Leisure"). However, Seneca's understanding of the nature of leisure, its impact on human (development of his physical and spiritual qualities) remained unchanged. He advised to live "according to nature", to contemplate what God created, to understand own needs due to own safety, modesty, courage, rejection of glory, wealth, power and high positions. The "life in leisure" can be achieved by reading, reflecting on good and evil, communicating with friends, "feeding the mind" with new knowledge, "digesting" it, that is, absorbing it with soul and mind²⁹.

The destructive leisure trends are evidenced by satires of Juvenalis, who believed that it is impossible for an honest person to stay in Rome because of domination of frauds, thieves, hypocrites who spend their lives in fornication, corruption, permissiveness and cruelty of leisure forms³⁰.

Roman thinkers understood the social and political significance of leisure, its potential power, influence (positive or negative) that it can have on human. The work of Tacitus "Life of Cnaeus Julius Agricola" refers to how Agricola, in order to teach the British peaceful existence and to curb their militancy, took the "most useful" measures, namely: encouraged to build the temples, forums, porticos, thermas; organized eloquence competitions; involved the British in banquets and entertainment. Tacitus emphasized the manipulative nature of such actions: "What was a step to further enslavement was called by them, inexperienced and simple-minded, the education and enlightenment". Knowing the burden of soldier life and considering the army as the direct support of the imperial regime, he strongly condemned leisure among military men, arguing that leisure would inevitably lead to corruption and frustration, loss of power due to pleasure and fornication, to instability of moral principles. As a result of leisure, the military men "forgot the system, duty, work strengthening the body ... idleness destroyed bodies, low passions – souls"³¹.

²⁹Seneka L. A. (1996). Moral'ni lysty do Lutsiliya. (A. Sodomora, trans.). K.: Osnovy. 603 s. (in Ukrainian); Seneka, L. A. (1997). O skorotechnosti zhizni // Istoriko-filosofskiy ezhegodnik '96. S. 16–40 (in Russian).

³⁰Juvenal. (1938). Satyra III. Nevyghody stolychni. Antychna literatura: zrazky staroghrecjkoi ta rymjskoi khudozhnjoji literatury. (O. I. Bilecjkij, ed.) K.: Rad. shkola. S. 441–447. (in Ukrainian). S. 442.

³¹Juvenal. (1938). Satyra III. Nevyghody stolychni. Antychna literatura: zrazky staroghrecjkoi ta rymjskoi khudozhnjoji literatury. (O. I. Bilecjkij, ed.) K.: Rad. shkola. S. 441–447. (in Ukrainian). S. 630.

Many works of Roman thinkers refer to new cultural values, justify the need to spiritually fill the leisure. Marcus Aurelius understood leisure as a means of establishing a decent, godlike life, as he concluded that nothing new could take place; everything that is, always has been; everything moves in a circle; persistence of the world is the cause of failure when it comes to re-educating people; dreaming of impossible is madness. Realizing that leisure requires a man courage, purposefulness, reliability, distinguishing himself from chance, passion, self-love, moments of fate, the emperor instructed the descendants: "Have you been distracted by something brought from the outside? Give yourself some leisure to learn something good again, stop spinning as whirligig..."³².

2. Ancient Roman otium as a Cultural Practice

The question of the relationship active vita and vita competitiva in the life of Roman was no argument active life with admitted priority, useful and worthy of a citizen. Therefore, the ideal leisure is, first of all, a day off from work or a day of worshipping the Gods (this is how Virgiliy described the leisure activity of the farmer)³³.

The agrarian basis of the Roman community was decisive in the V–IV centuries BC and the situation has radically changed in the III–II centuries BC: as a result of victorious wars, Rome (III0II cent. BC) reigned throughout the Mediterranean. The expansion of Greek culture undermined the foundations of Roman morality, and the transformations in the content of "otium" changed the relationship between the duties and rights of the Romans. However, along with the awareness of the Romans of their individual values in society, there was spread the pride, hedonism, delicacy and love to luxury. Hellenistic borrowings had a double effect: on the one hand, they changed forever the structure of Roman society, on the other, they opposed to two types of social morality – work and pleasure – two opposite models of education and training³⁴.

The acquired passion for the variety of pleasures by the Romans was constrained by numerous regulations and laws about luxury, aimed at maintaining the Roman traditions. In general, there were adopted more than

³² Avreliy M. (1993). Naedine s soboy. Razmyshleniya. (A. V. Dobrovól'skogo, Ed.). K.-Cherkassy: Real, 1993. 147 s. (in Russian).

³³ Vergiliy. (1968) Georgiki. Antichna literatura: khrestomatiya. (O. Biletskiy, Ed.). Kyiv: Radyanska Shkola, P. 436 (in Ukrainian).

³⁴ Rober Zh.-N. (2004). Rozhdenie roskoshi: Drevniy Rim v pogone za moody. Moscow: Novoe literaturnoe obozrenie (in Russian).

forty laws on luxury during the III century BC and the I century AD, which were ineffective, however³⁵.

The handover from the civil wars of the Republic to the Principate of Augustus changed the very sense of otium: from a private, individual sphere of life to a socially significant one. The destruction of Republican values led to the transformation of traditional forms of leisure activities into mass performances. It is necessary to consider the passion of the people for public entertainment, despite the religious worldview of the Roman, because religion surrounded him during the war and peacetime; its laws were subjected to the soul and body, private and public life, holidays and people's assemblies, meals and court cases. Roman life consisted of favorable (dies fasti) for work and unfavorable (dies nefasti) days for any activity. Holidays were considered unfavorable for work, because they were dedicated to the Gods. Thanks to such "feriae" (days off from work, rest days, days of obligatory leisure activity dedicated to the Gods) and "the Gods are worshipped and this is not an obstacle for everyday affairs"³⁶. Holidays were a religious duty of every Roman, a duty which was as serious and important as work.

"Obligatory" leisure activities were dedicated to the Gods in Imperial Rome, there was slightly declared task – to hold power and form public opinion. This affected the number of organized "entertainments". If in the Republican period there were annually arranged national holidays, which lasted in average 109 days (Roman and Plebeian games, games of Ceres, Apollo, Cybela, Flors, the Triumph of Sulla, Saturnalia), during the Empire period the number of holidays increased to 175. The social function of religious holidays has also changed: their own sacred significance has decreased, yielding to the value of entertainment.

Important forms of organization of leisure activity were also significant events of public life, which drew to the top of the mass of citizens. So, the opening of the Colosseum folk festival lasted during a hundred days, the end of the second Dacian war the Romans celebrated during 123 days etc. Multi-day celebrations included not only the rituals of worshipping the Gods: Saturnalia, which "grew" from one day in 217 BC to seven days under the reign of Domitianus, were dedicated to worshipping the Gods only at first day, while others were given to "December freedom" (Horace). The diversity of types and the dimensions of the mass entertainment offered by the emperors to the people, reflected in the works by Lucius Claudius Cassius Dio

³⁵ Kvashnin, V. A. (2006). *Zakony o roskoshi v Drevnem Rime epokhi Punicheskikh voyn*. Vologda: Rus. (in Russian).

³⁶ Tatsit, P. K. (2001). *Annaly; Malye proizvedeniya. Istoriya [per. s lat.]*. Moscow: AST; Ladomir S. 315. (in Russian).

Cocceianus³⁷ and Gaius Suetonius Tranquillus³⁸, where there are mentioned usual competitions of pair and four chariots, hiking, horseback riding and sea battles; baiting of wild animals and Gladiator competitions.

Public attention to circus competitions was attracted by its splendor as well, and the opportunity to demonstrate their wealth and presence of the nobility at the competition, and entertainment and food after the circus, and the opportunity to socialize. And especially was influenced by the circus of changes in the political orientations of Roman citizens. If in the Republican period the Romans took an active part in the political life of the city, in the era of the Empire they lost the right to vote and their political function was nullified. The introduction of four factions in the circus – white, red, blue and green – was intended to create the illusion of political importance of the people. Two fractions (blue – aristocrats, green – people) had clearly defined political differences, while red and blue, creating controversy and excitement in society, supported the privileged strata of the population, the common people. Namely these “political” debates gave circus performances the greatest popularity among Roman performances³⁹.

The aristocrats of Roman society, drowning in luxury, created a dangerous precedent, forming a social ideal of wealth and the accumulation of life’s benefits, without labor, generating in the minds of free citizens a passion for wealth and idleness. In mournful elegies Ovidiy calls: “Look at your accounts for your entertainments and you be will easily convinced, Auguste, much money were spent for your entertainments”⁴⁰. The aversion to work was so ingrained among the Roman citizens, most of whom begged without even a roof over their heads, that the ideal life was perceived as a state of inactive bliss, absolutely free from the necessity to satisfy any physical needs and actions. The people, accustomed to entertainments, fun and games, thought of spending time in fun and entertainments, the only possible and justified, “These distractions had become necessary and idleness had developed their taste”⁴¹.

At the same time, the trend to control private life of the Romans, limited in the period of the Republic of Patriarchal dogmas and the suppression of

³⁷ Kassiy Dion Kokkeyan. (2013). *Istoriya kesarey. Knigi LVII–LXIII “Istorii rimlyan”* (V. N. Talakha & S. A. Kuprienko, Ed.). Kyiv: Vidavets Kuprienko S. A. (in Ukrainian).

³⁸ Svetoniy. (1993). *Zhizn dvenadtsati tsezarey.* (M. Gasparov, trans). Moscow: Nauka, P.74-100; P. 202-207; P. 208-219.

³⁹ Martsial (2000). *Epigrammy.* (F. Petrovskiy, Trans). Kharkov: Folio; Moscow: AST (in Russian). S. 277.

⁴⁰ Ovidiy, P.N. (1999). *Lyubovni elegii. Mistetstvo kokhannya. Skorbotni elegii* (A. Sodomora, Trans.). Kyiv: Osnovi (in Ukrainian). S.204.

⁴¹ Martsial (2000). *Epigrammy.* (F. Petrovskiy, Trans). Kharkov: Folio; Moscow: AST (in Russian). S. 111.

luxury, turned into the Imperial epoch on the monitoring forms of entertainment. Special attention of the authorities was attracted by the associations of leisure activities type: colleges, groups and taverns⁴². The government controlled religious activities of its citizens as well, in particular inhibiting (enabling) to implement new Gods into Pantheon. In end, this led to a complete mismatch of folk rituals that existed within the masses and the official religion. The culmination stage of the formation of leisure activity on the level of state policy of the Roman rulers was the deification of the emperors and the spread of religious rituals on them.

The state ideas of the Empire were most fully embodied in the construction of buildings for purely practical purposes, including in the sphere of leisure activity. Hence, the active construction of forums, baths, porticos, gardens, among which the life of the Roman passed, full of a huge number of ceremonies, participation in which was obligatory. Gymnasiums, palastras, porticos, baths, poultry houses, menageries, this was all “surplus” with the help of which Roman citizens tried to assert their social position in society. The passion for excessive luxury in the days of the Empire has become almost the only sign of the person’s belonging to the privileged class. Not surprising is the fact that for a short time, public establishments, and private homes the privileged elite of Roman society evolved into real museums. A new type of Roman was formed a private collector. The expansion of Hellenistic culture, as a result of which ancient Rome was flooded not only with works of art, but also with foreign artists, philosophers, poets, whose activities contributed to the passion of the Romans for artistic works, was a powerful impetus to the development of leisure activity, saturated with aesthetic and intellectual pleasures.

Was it the basis for the development of the real artistic taste of the Romans, which they didn’t have before the conquest of Syracuse in 212 BC according to Plutarch’s words nothing beautiful, attractive and sophisticated?⁴³. The answer to the question is in the formation of a new socio-psychological type of personality – the Roman intellectual. The intellectuals of Rome were United into *circulus* (lit. – circle), prototypes of modern interest clubs to discuss philosophical, literary problems, issues of political and national importance. The formation of the Roman intelligentsia (Mark Terentius Varron, Publius Cornelius Lentulus, Mark Caelius Ruf, Mark Gullius Cicero, Cornelius Nepot, Gaius Valerius Catullus, Lucretius Carus

⁴² Tatsit, P. K. (2001). *Annaly; Malye proizvedeniya. Istoriya* [per. s lat.]. Moscow: AST; Ladomir. S. 132-133. (in Russian).

⁴³ Plutarkh, M. (1961). *Sravnitelnye zhizneopisaniya*. (M. Grabar-Passek, ed.). Moscow: Akademiya nauk SSSR, pp. 382–407 (in Russian). S. 396.

and others) was also influenced by Greek culture: Greek logic transformed Roman thought, and the assimilation of techniques and methods of intellectual activity of the Hellenistic world enriched the Roman elite. However, intellectual maturity, reached the Roman Republic in the last days, contributed not only to the Greek borrowing, but also the interpenetration and synthesis of Roman and Greek cultures.

Modification of the ideal *vir bonus* demanded a valorous Roman, in addition to purely traditional qualities that are important for an active participant in the life of the *civitas* – *virtus*, *fortitudo*, *constantia*, *fides*, *pietas*, *dignitas*, *gravitas*, *auctoritas* – and also education, specific knowledge, ability to self-improvement, which is partly embodied in new qualities – *urbanitas* and *humanitas*. The intellectual elite of the ancient Rome tried to distance themselves from the motley of aristocratic elite of the society with the originality of the life and culture of everyday life that carried out their leisure time in entertainment and idleness.

Thus, Virgiliy created his “*Bukoliki*” in the conditions of rural solitude, which provided the poet with wise serenity, spiritual and mental peace. The real intellectual, spiritual sweetness, according to Virgiliy, is the result of poetic meditation, intense mental search for the truth of life. The train to calm happiness, peace and freedom of the soul is reflected in Horace’s work, who tried to realize his life concept at the *Villa* presented by the *Patron* in *Sabine*. Horace repeatedly complained that the people expected from the performances only entertainment: from comedies to fights, from tragedies to luxurious triumphal processions.

If the city was considered the accumulation of unnecessary worries, the rural life was a refuge from them and the possibility of free *otii*. After all, the intellectual *otium* required a special atmosphere corresponding to the lifestyle and the surrounding space. An important emphasis in this discourse was on a decent old age, accompanied by “leisure activity with dignity”, pointing not only onto the civilization of society, but also to the high level of aestheticism of everyday life (remember the letters of *Pliny the Young*). The philosophy of intellectual feast was opposed by *Lukull*’s feasts of luxurious idlers who were not capable of “high” intellectual games.

The growth of interest in the philosophy of scientific and literary work was reflected in the middle of the I century and has gained popularity in this form of activities including public readings, which contributed the involvement of intellectual activities to a wide readership.

CONCLUSIONS

The ideology and the system of values of the Roman was determined by patriotism, and the ideal model of the citizen was courageous, persistent, loyal

to the state, temperate in the pleasures of a disciplined citizen. The main focus on economic equality formed social psychology, focused on moderation in consumption and everyday life as a norm. It is the working morality of the people frugal and modest, valuing labor, condemning luxury and extravagance. Consequently, the leisure was perceived as a rest from labor, a day dedicated to the worshipping of the God, enjoyment, safe for moral values (Virgiliy, Georgiki).

Due to the conquests in the East and the expansion of Greek culture, the system of values of the Romans underwent significant changes. A new type of person was formed, whose social functions were reduced not only to political activity, performance of military duties and observation of religious rites but, first of, various pleasures. The consequence of the loss of stable moral principles, adapted to the aggressive policy, was the cult of pleasure and prestige, which was clearly manifested in the transformation of the content of leisure activity.

The coexistence of particularism and universalism was typical for many spheres of spiritual life, the contradictions between official ideology and reality, the discord between the individual and the state, rights and duties, collectivism and individualism, the spirit of self-sacrifice and the thirst for pleasure led to the functioning and development of leisure activity in two interrelated “spheres”: entertainment and intellectual. The performance is not just a mass action, it is the main collective pleasure to which the subjects had the right, it is the only luxury available to the poor. Hence, reducing the content of leisure to “bread and entertainment”, “money and pleasure”, the gradual loss of the majority of the ability to perceive leisure activity as a means of self-development, self-improvement and cultural creativity.

For the representatives of the Roman intelligentsia it was typical to have high level of education, mastering the complex intellectual work, and most importantly – self-realization in the intellectual sphere of activity – intellectual otium. However, for the majority of the population, the Roman borrowing of otium graecum did not have an introspective, self-absorbed social character, freed from a sense of moral responsibility, it required only an external, leveled assessment, contrary to the individual-spiritual content of culture.

SUMMARY

The aim of the research is to analyze the ancient Roman leisure activity as a theoretical reflection and cultural practice. The methodology of the research is reduced to the usage of historical and cultural approach that allows to combine diachronic and synchronic methods to the study leisure activity as a polysemantic cultural phenomenon. The topicality of the

research is to identify and substantiate the conditions that led to the formation and development in ancient Rome intellectual and entertainment leisure activities, contemplative and active leisure activities, leisure activity as a means of self-development and leisure activity as a mass cultural practice. Conclusions. Leisure activity was perceived as a rest from work, a day dedicated to the God, pleasure, safe for moral values (Virgiliy, Georgiki) in Republican Rome. As a result of the conquests in the East and the expansion of Greek culture, the value system of the Romans underwent significant changes, which was clearly manifested in the development of leisure activity in two interrelated “spheres”: spectacular and intellectual. Spectacular otium has become a powerful tool of political impact on masses, a method of mobilization and employment, and consequently reducing the content of leisure activity to “bread and sights”, “money and pleasure”, the gradual loss of the majority the ability to perceive leisure as a means of self-development, self-improvement and cultural creation. For members of the Roman intelligentsia leisure activity is, first of all, the luxury of companionship, intelligent conversation and literature classes. However, for the majority of the population, the Roman borrowing of otium graecum didn't have an introspective, self-absorbed social character, freed from a sense of moral responsibility, it required only an external, leveled assessment, contrary to the individual and spiritual content of culture.

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HISTORY OF CLUB DEVELOPMENT IN UKRAINE

Liudmyla Polishchuk

INTRODUCTION

The history of clubs as socio-cultural institutions is closely related to the history of the country as a whole. Changes in the socio-political structure of the country have always influenced the socio-cultural sphere, the content and direction of cultural institutions depended on the ideology of the ruling elite, and their model was formed.

At the present stage, there are almost no works devoted to domestic clubs of the pre-revolutionary era (before 1917). Only a few sources from the field of extracurricular education and overcoming illiteracy among peasants and workers, which characterize the activities of clubs of the pre-Soviet period, have been preserved. Among them are the works of A. Obukhov, K. Sadyrin, H. Cherkeзов, who investigate the issues of out-of-school tutoring of children, peculiarities of organization of national universities and activities of district organizations of out-of-school education, *etc.*

In the first studies of the Soviet period, cultural and educational activities of clubs are considered mainly as a means of ideological influence on people (V. Zelenko, N. Krupska, Ye. Medynskyi, M. Petrovskyi, S. Siropolko, L. Frid, M. Tzariev-Luniev, S. Shatskyi and others). The works of Soviet scientists were aimed at exploring the possibilities of realizing the political and educational potential of the clubs, as evidenced by studies by B. Berezin, Ye. Zazerskyi, L.Kohan, Ye. Smirnova and others.

The second stage of club studies (the '60s of the 20th century) began with the works of O. Sasikhov and Y. Streltsov (Fundamentals of Club Studies), which revealed the democratic nature of the club and its socio-communicative function as an active dominant. The author of the first textbooks on club studies D. Henkin, S. Ikonnikova, V. Kovsharov, M. Skrypniev and A. Solomonik, substantiated the scientific foundations of the club activities. The '60s-'80s of the 20th century are considered the most productive period in the formation and development of club studies. A significant contribution to its development belongs to M. Ariarskyi, H. Yevtieva, E. Zazerskyi, L. Kohan, Yu. Krasilnikov, M. Maksutin and Ye. Smirnova, *etc.* During this period, the history of cultural and educational work in the USSR was actively researched. This issue is devoted to the thorough works of M. Andreieva, A. Vynohradov, S. Pinalov and H. Cherniavskyi, in which the clubs were considered in the context of the history of cultural and educational work.

During the perestroika, interest in the theory and practice of the club business decreased significantly, this is explained by the change in cultural values. The clubs were perceived as an anachronism, as an example of ideologized institutions of the administrative-command system, which fulfil an ideological-educational function in the sphere of leisure, which caused the alienation of a large part of the population, especially young people. Authors of researches of 1980s of 20th century considered the possibilities of re-profiling the clubs into public centres of self-education, unregulated communication, spiritual development and active rest of the population (N. Zaporozhets, A. Leonova, O. Myroniuk, O. Sknar, N. Tarasiuk and E. Chmykhalo, *etc.*).

A qualitatively new period in the study of club work begins with the proclamation of state independence of Ukraine when clubs are regarded as socio-cultural institutions whose task is to meet the needs of the population in recreation, health, training, development of creativity and leisure organization. Contemporary research authors are expanding club science by addressing the club's methodological and theoretical issues, N. Babenko, O. Hrytsenko, G. Yeskina, Y. Kliuchko, A. Myronenko, N. Ostanina, I. Petrov, N. Samoilenko, O. Terekhov and N. Tsymbaliuk, *etc.* addressed various aspects of club activity.

Despite the considerable number of scientific publications on the problems of club activities, Ukrainian club studies lack comprehensive studies of the history of the development of domestic clubs, especially the period before the beginning of the twentieth century (that is, before the revolutionary events of 1917). Such a scientific gap shapes the attitude of the population to the clubs exclusively as to the achievements of the Soviet era, which negatively affects the activity of modern Ukrainian clubs and the forecasting of their further development.

1. The Origins of Club Activities

The club as a social institute was born in a primitive society in the form of 'men's houses', which were a kind of community centres, a meeting place for a community council, a reception, a dining room, a place for relaxation and communication. They were of great social importance in the ancient world¹.

¹ Volodina O. V. (2014) Realizatsiya pedagogicheskogo potentsiala uchrezhdeniya kul'tury klubnogo tipa [Realization of the pedagogical potential of a club-type cultural institution] (PhD Thesis), – Stavropol', Severo-kavkazkiy gosudarstvennyy tekhnicheskiy universitet; Tuev V. V. (1997) Istoriya kluba : ot neinstitutirovannykh form klubnogo obshcheniya do pervykh organizatsiy klubnogo tipa [Club history: from non-institutional forms of club communication to the first club type organizations]. Kemerovo: KGIK (in Russian); Tuev V. V. (1998) Fenomen kluba : Istoriko-pedagogicheskiy analiz [Club Phenomenon: Historical and Pedagogical Analysis] (PhD Thesis), Moskva: Moskovskiy gosudarstvennyy universitet kul'tury.

In practical life, every native-born in Athens belonged to such public associations as *phil* or *fraternity*, and representatives of the nobility: even to political clubs, *heteri*, headed by aristocratic and democratic leaders. During the heyday of policies, these entities emerged for private purposes, but they did not contradict the interests of the state as a whole. By the beginning of the 6th century B.C., merchant companies, religious associations, even piracy societies were created. Religious associations (the most common among them are the *Oregonians* and the *Fiasas*) were organized not only for protection against external threats and harassment, but also for the purpose of joint leisure and rest. Reasons for identifying such associations with clubs give them common features: democracy and self-government, the existence of rules for members of associations or associations, community organizations².

The prototypes of modern clubs in the ancient world were the *ghetteries*, which functioned as political associations of like-minded people, philosophical unions, or secret, opposition-to-power organizations; *Circles* (*circuli*), which brought together the opposition intelligentsia who were going to discuss political, philosophical or literary issues; terms in which to meet with like-minded people, joint rest and recreation. In some *thermae*, there were libraries, reading rooms, literary, music and picture halls, galleries for walks, restrooms, gardens and fountains, which attracted a large number of people³.

In the era of the 'corporate' Middle Ages, everyone, regardless of their social status, was a member of a particular group or association. Vassal unions, knightly associations and orders, monastic brotherhoods and catholic clergy, city communes, merchant guilds and professional workshops, protective associations, rural communities, blood relatives unions, patriarchal and individual family groups combined individuals into the close, individual their participants' protection and assistance. Each group had its own rules as a charter (statute), a code of conduct, rules that are binding on all members of the team. Social relationships within such corporations were built not vertically, but horizontally, requiring each group member to have a certain discipline, a related lifestyle, and even opinions, to adhere to certain stereotypes of behaviour. The principle of equality of members of the corporation was its constituent feature even when it was not observed in practical life⁴.

² Ustinova Yu. B. (1988) *Chastnye kul'tovye soobshchestva u grekov* [Private cult communities of the Greeks]. *Byt i istoriya v antichnosti* [Life and history in antiquity]. Moscow: Nauka, pp. 192–218.

³ Verzhbitskiy K. V. (1999) *Traditsionnye formy obshcheniya u rimlyan i oppozitsiya Yuliyam-Klavdiyam* [Traditional forms of communication among the Romans and opposition to Julius-Claudius], *Vestnik Sankt-Peterburgskogo universiteta*, vol. 2, pp. 104–107.

⁴ Gurevich A. Ya. (1972) *Kategorii srednevekovoy kul'tury* [Categories of medieval culture]. Moscow: Iskusstvo. (in Russian)

However, the first prototypes of clubs, in the modern sense, emerged as club rooms in English taverns at the end of the 16th century. The tavern, thanks to its accessibility and openness, has been a favourite pastime for many of its visitors. It is known that the founder of the first club in the Mermaid Tavern was Walter Raleigh and the members of the club were Beaumont, Fletcher and Shakespeare⁵. It was in England that the perception of the club as an institute of culture was formed, manifested in the selectivity of communication, the localization of leisure space and the shared interests. From here, there are three main types of clubs tested in English socio-cultural practice: clubs associations at taverns and coffee shops; tubers eating for political, professional, literary and other interests; clubhouses specially designed and built for multifunctional leisure activities. The main activities of the clubmen in English clubs were communication and leisure, so communication and leisure functions prevailed. As a complete system of leisure activities, English clubs were able to satisfy the demands of different socio-demographic groups, although access to them by female members was severely restricted⁶.

In the 19th century, intensive development of English club practice acquired. In England, there were two tendencies in the development of clubs: the first tendency related to the content of leisure activities, resulting in the formation of sports, dance, religious, music clubs; the second tendency aimed at the socio-cultural organization of clubs with a clear socio-demographic orientation, which resulted in student, women's, teenagers and other clubs. The involvement of people in the club movement took place through vertical social relations, which was especially evident in aristocratic, elite clubs that united statesmen, diplomats, financiers, businessmen, famous writers and journalists. The tendency to involve the English in club life was ensured by a well-established system of school and university education: the 'club tradition' was instilled in young people on the school bench. In every English school, a compulsory 'club set' was distributed: athletic sports clubs, leather ball clubs, golf clubs and discussion boards, etc⁷.

Thus, English clubs represent the first-ever compromise between two natural needs of people: self-sufficient cohesion and leisure communication. During the first centuries of the existence of English clubs, the essential

⁵ Izdateli Brokgauz, Efron (1900) Klub [Club]. Entsiklopedicheskiy slovar' [Encyclopedic Dictionary]. Sankt-Peterburg, pp. 1119.

⁶ Vygzuzova E. V. (2005) *Elitanye kluby v kul'turnom prostranstve Rossii kontsa XVIII – nachala XX vv.* [Elite clubs in the cultural space of Russia in the late 18th – early 20th centuries] (PhD Thesis), Ekaterinburg: Ural'skiy gosudarstvennyy universitet im. A. M. Gor'kogo

⁷ Komissarenko S. (1997) *Angliya : klubnye traditsii* [England: club traditions]. Klub, no. 11, p. 18.

principles of their activities were formed, which subsequently became a model for club associations in other countries: the voluntary nature of the association; the right of the club members to choose the program and content of the activity independently; separation from the external environment, which was intended to cause its members 'euphoria of freedom', independence from society; the existence of specific 'rules of the game' and the obligation of their observance by the club members; an extensive system of club self-government; availability of club symbols and other 'club' property; the elitist character of the club and the corporate pride of its members.

British scientists have identified five major principles of English clubs:

1. The combination of openness and exclusivity. On the one hand, the club creates the illusion of openness ('for all-comers'), on the other hand, it uses various means of 'personnel' sustainability, 'election' by introducing membership and a specific procedure for its granting.

2. Combining mobility and micro-sociality: clubs are small social groups that, in turn, are divided into even smaller circles, united by friendships and a keen sense of common ownership of something (from shared relics to shared ideas and tastes);

3. The combination of 'profile' and 'sociality'. Even clubs set up for 'non-political' interests, necessarily carry out public events (discos, carnivals, parties and donations), not related to the motives of formation. Sports clubs, most indicative of social openness, are due to the specificity of sports, its focus on different social strata.

4. Depending on the meeting place (premises, playground), etc. This factor encourages the active cooperation of clubs with various institutions, commercial companies and local authorities, which are most often the benefactors of the clubs, providing premises for their activities.

5. The acquisition of a new socio-cultural identity (*i.e.* a temporary change in its social role) as a major psychological motive for involving citizens in club activities. Entrepreneurs, workers, housewives for some time become informal leaders, commanders, coaches and social service workers, *etc.*⁸.

In the territory of the former USSR, the first club was established in Petersburg in 1770. V. Zhukovskiy, M. Karamzin, I. Krylov and O. Pushkin took an active part in the life of the so-called 'English club'. Subsequently,

⁸ Darwin B. British clubs (British in pictures). – London, 1943. – 48 p.; Fitzgerald P. The History of Pickwick. – London, 1891. – 375 p.; Griffiths M.A. Clubs and clubmen. – London, Hutchinson and Co. – London, 1907. – 343p.; Timbs J. Club life of London during the 17th, 18th and 19 th centuries. In two volumes. – London, 1866. – V.1. – 364 p.; Wertheimer J. The Law relating to clubs by M. Turner and A. S. Wilson. – London : Swell and Maxwell, 1903. – 236 p.

such clubs appeared in major cities of the Russian Empire. Clubs of pre-revolutionary Russia were distinguished by the class character, which is reflected in their name: nobility, boyars, merchants; the elitism and the regulated nature of club membership; stringent conditions for joining the club; conservativeness and tradition; aristocratic service; an atmosphere of comfort, comfort and sophistication; availability of relevant documents regulating the activities of clubs⁹.

In Ukraine, in the 19th century, a common version of the clubs was also 'gatherings' by the class as nobility, merchants and officers. They were created practically in all provincial cities, had restaurants, concert halls, even parks (for example, the Merchant Assembly in Kyiv as the Merchant Garden).

The model of the English club in Ukraine was the Noble club, which was established in 1838 in Kyiv, on Khreshchatyk Str. Its main activity was the organization of leisure nobles: the club held balls, masquerades, card games and billiards. Despite the fact that the club was closed, during 1883–1884, it was systematically organized folk readings. Reports of the People's Reading Commission in Kyiv indicate that it was the Noble Club that received the highest number of listeners (mostly representatives of the urban population): in 1883 – 7,073, and in 1884 – 12,175 people¹⁰. Such an example confirms the participation of members of the Noble Club in the public life of the city.

In 1849 the Odessa Noble Assembly was opened in Odessa. Unlike the English club, which acted as an institution 'from the outset inaccessible to the so-called middle class', the Odessa noble assembly was a relatively democratic and open leisure structure, which systematically arranged family evenings, but 'there were so many people wishing to attend these balls that even the large premises of the Richelieu Hotel could not accommodate them'¹¹.

The noble gatherings of the 19th-20th centuries, which were created and operated in almost every provincial centre, reflected the original phenomenon of the club with all the characteristic features of communicative and leisure mentality: the class principle of association of people in socio-cultural societies; closed to outsiders; solidarity and expressed interest in the interests of club members. Over time, the social base of clubs expanded, which was

⁹ Berezin B. I. (1989) *Sovetskiy klub : sostoyanie i perspektivy razvitiya* [Soviet club: state and development prospects]. Moscow: VIPKRR. (in Russian)

¹⁰ Komissiya narodnykh chteniy v Kieve (1888) *Otchet komissii narodnykh chteniy v Kieve za 1882–1887 gg.* [Report of the commission of public readings in Kiev for 1882–1887]. Kiev: Tipografiya shtaba Kievskogo voennogo okruga. (in Ukrainian)

¹¹ Cherkezov G. (1912) *Vneshkol'noe popechenie o detyakh* [Extracurricular care for children]. *Prakticheskaya shkol'naya entsiklopediya* [Practical School Encyclopedia]. – Moscow: Tipografiya T. P. Ryabushinskogo, pp. 709–715.

driven by their popularity among various segments of society. The most characteristic of the class principle was among people of the same social status, origin, educational level and property status, which ensured corporate elitism. The legal status of the clubs consists of a fixed membership, an established and self-governing style of self-governance, strict adherence to the club members' code of rules, stereotypes and stamps of club behaviour.

Although clubs and so-called balls were organized in large cities, traditional gatherings of young people 'streets', 'music', 'evening', 'party' and 'sunrise' were popular in Ukrainian villages and towns, during which youth combined work with leisure hobbies (songs, dances, games, jokes and fables, *etc.*). For such gatherings, rooms (rooms, one of the club's values as 'club room') were rented, rooms were invited, musicians were invited and joint parties were organized. The main purpose of such gatherings was acquaintance, communication, rest and entertainment¹². The main community centres of the traditional village were the church and the square near the church as centres of spiritual and religious unity of the laity. The Ukrainian churches used the experience of work of organizations of a semi-church nature as fraternities (honey fraternities), which were created in the 15th century to maintain order in churches, close ties with the fraternities (congregations of members of rural communities, artisan corporations, *etc.*), to organize collective prayers in honour of their patron saint and common feast. The main purposes of the church square were to direct public life and provide festive leisure. They came here to solve social problems, to communicate, to listen to stories and songs of wandering lyricists, kobza (lute) players, bandura players, to take part in folk festivities and entertainments¹³.

The integral parts of a traditional Ukrainian village or village were taverns or ham, which can also be called a kind of country club. After all, people gathered here to exchange information, hear news and listen to music. In the cold season, dinners, dances took place in the tavern or ham, and families came here on holidays¹⁴.

¹² Bosyk Z. O. (2010) Vechornyci ta dosvitky [Evenings and sunrises]. Pam'jatka-zapytalnyk na dopomogu zbyracham ukrajins'koho usnoji narodnopoetychnoji tvorčnosti [Questionnaire for help to collectors of Ukrainian oral poetry]. Kiev: NAKKKiM, pp. 46–51.; Ponomarjov A. (1996) Tradycijni normy povedinky i dozvillja [Traditional standards of behavior and leisure]. Etnichnistj ta etnichna istorija Ukrajiny [Ethnicity and Ethnic History of Ukraine] (Elektronnyj resurs). Retrieved from: <http://libr.org.ua/book/78/2397.html> (accessed 10.12.10).

¹³ Ponomarjov A. (1996) Tradycijni normy povedinky i dozvillja [Traditional standards of behavior and leisure]. Etnichnistj ta etnichna istorija Ukrajiny [Ethnicity and Ethnic History of Ukraine] (Elektronnyj resurs). Retrieved from: <http://libr.org.ua/book/78/2397.html> (accessed 10.12.10).

¹⁴ Ponomarjov A. (1996) Tradycijni normy povedinky i dozvillja [Traditional standards of behavior and leisure]. Etnichnistj ta etnichna istorija Ukrajiny [Ethnicity and Ethnic History of Ukraine] (Elektronnyj resurs). Retrieved from: <http://libr.org.ua/book/78/2397.html> (accessed 10.12.10).

In the second half of the 19th century in the countries of Central and Eastern Europe, clubs, coteries, cultural and educational associations were established, among which the most influential were Lviv 'Enlightenment', Kyiv 'Old Community' and others. Thus, the Enlightenment Society, founded in 1868 in Lviv, numbered 73 branches and 2,944 reading rooms in 1914; in 1939, their number increased to 83 branches, covering 360,000 members¹⁵ and had 3,208 readings, 2,065 dramatic circles, 1,105 choirs, 104 orchestras, 439 self-educational circles, 533 'Young Enlightenment' circles, 845 fans of Ukrainian books and others¹⁶. Through printed media, literary, theatrical, vocal, choreographic and musical circles, the society promoted Ukrainian culture among the population.

Cultural and educational work among the population was also carried out by the Kharkiv and Kyiv Writing Societies, the Odessa Slavic Society, the Chernivtsi 'Russian Conversation', etc¹⁷. . In 1908, the 'Ukrainian Club' was established in Kyiv, the participants of which organized concerts, theatrical performances, reading books, engaging students in social and cultural activities. But both it and most of the 'Enlightenments' were closed during 1910-1912. Such a 'traditional' history with the clubs of the Ukrainian intelligentsia will be repeated at least twice: in the early 1960s, when the Kyiv Creative Club became a catalyst for the Sixties but was soon forbidden, and in 1987-1988, when the semi-illegal Ukrainian Cultural Club became a harbinger of Ukrainian opposition organizations like the Ukrainian Language Society (ULC), Rukh and the Ukrainian Radical Party (URP)¹⁸ .

At the end of the 19th and early 20th centuries with the disappearance of the aristocracy as a separate social group in the structure of society, aristocratic clubs ceased to exist. Instead, 'people's houses' appeared, the most famous of which was the 1903 People's House of the Kharkov Literature Society. There was a lecture room, a library, a reading room and a music hall in his room.

Like the people's houses in the early 20th century 'People's Universities' (Kyiv, Kharkiv, Simferopol and Chernihiv), whose main task was not to educate, but to educate the people, became widespread: 'the university means serving the educational needs of the pariahs of Russian enlightenment, *i.e.* the

¹⁵ Ghrycenko O. A. (1998) Klub [Club]. *Narysy ukrajinsjkoji populjarnoji kuljтуры* [Essays on Ukrainian Popular Culture]. Kiev: UCKD, pp. 245–259.

¹⁶ Fostun S. M. (1999) 130-richchja Tovarystva "Prosvita" [Prosvita Society's 130th Anniversary], *Vyzvoljnyj shljakh : suspiljno-politychnyj i literaturnyj misjchanyk*, vol. 1, pp. 13–24.

¹⁷ Zakovych M. M. (ed.) (2004) *Kuljturologhija : ukrajinsjka ta zarubizhna kuljtura* [Culturology: Ukrainian and foreign culture]. Kiev: Znannja. (in Ukrainian)

¹⁸ Ghrycenko O. A. (1998) Klub [Club]. *Narysy ukrajinsjkoji populjarnoji kuljтуры* [Essays on Ukrainian Popular Culture]. Kiev: UCKD, pp. 245–259.

disadvantaged in cultural relations'¹⁹. Visitors to popular universities received 'neither diplomas, nor careers, nor bureaucrats, no direct benefits from this knowledge; it strives for it 'for the soul' sees in it the source of satisfaction of his/her moral personality'²⁰. People's universities organized 'People's Conservatories', 'People's Theatres', literary and musical evenings, cinema screenings, and organized excursions.

2. Activities Clubs of the 20th century

The history of Soviet clubs in Ukraine begins in the post-revolutionary years of the twentieth century, when the merchant, noble, educational clubs were completely destroyed, and replaced by the Soviet model of the club: the red corner, the reading room, the village club, and the Palace of Culture.

The first Soviet clubs were political in nature, and their creation in Ukraine (as in the USSR in general) was the result of the revolutionary events of 1917, the ideologists and organizers of Soviet clubs used the principles of creating class aristocratic clubs, adapted to agitate and propagate ideas of the Bolshevik authorities.

Not only clubs but also new kinds of club-type institutions: cultural and educational groups and agitation and educational centres (in Ukraine in the late 1920s, there were more than 80 such agitation points), their main forms of work were performances, lectures, reports, conversations, agitation plays, newspapers and leaflets of propaganda content.

In rural areas, the cultural needs of the population were met by red corners, rural buildings and reading rooms. The Red Corner became a form of mass political education that embraced the peasantry and invisibly but firmly combined political education with peasant life. Political education in such corners was carried out by red readers, selected among demobilized Red Army men, teachers, party and Komsomol members, village council members, peasants, cultural workers, and rural builders²¹.

Clubs (Komsomol, school, party and workers) played a leading role in the system of leisure institutions at this time: 'the Soviet regime put on a 'red enlighten' rural clubs and won at a crucial time for itself in 1929–1933, at least some critical share of the younger generation Ukrainians, whose hands

¹⁹ Sadyrin K. (1912) Narodnye universitety [People's universities]. Prakticheskaya shkol'naya entsiklopediya [Practical School Encyclopedia]. Moscow: Tipografiya T. P. Ryabushinskogo, pp. 597–614.

²⁰ Sadyrin K. (1912) Narodnye universitety [People's universities]. Prakticheskaya shkol'naya entsiklopediya [Practical School Encyclopedia]. Moscow: Tipografiya T. P. Ryabushinskogo, pp. 597–614.

²¹ Baghmut I. A. (1927) Chervoni kutky na seli (kutkovi khaty chytaljni) [Red corners in the countryside (corner reading rooms)]. Kiev: Derzhavne vydavnytvo Ukraïny. (in Ukrainian)

were made and collectivization and dispossession and seizure of grain in 1933'²². Party organization was responsible for setting up the club business, communists and experienced political workers were sent to work in the clubs. In order to coordinate club work in the countryside, the post of district inspector for collective farms, reading rooms and red corners was introduced. The clubs combined a library, a cinema, a dance hall, amateur circles and it was in their multi-functionality that their advantage lay²³.

On the one hand, club activities were enriched with forms and methods of work that met the requirements of the new political order. Much attention was paid to the development of agitation and propaganda forms of work: agitation points, agitation parades, agitation storm, agitation trade, political courses, rallies, concerts and political reports. The ideas of political education were spread by publishing leaflets, posters and live newspapers. The practice of artistic illustration, which promoted active and conscious assimilation of knowledge, developed thematic evenings, educational cycles (geographical, literary, art, artistic and economic), staged social courts (industrial, political, historical and pedagogical) justified itself. Work in mugs and studios has been linked to local examples and facts, providing accessibility and simplicity to the most complex material²⁴.

In the course of the political and educational work of the club during this period, the following directions prevailed: propaganda of Leninism in circles of political literacy, Lenin circles and corners through talks, reports, lectures, live newspapers, staging, *etc.*; promotion of trade unions whose purpose is to promote and explain the main tasks of trade unions, the rights and responsibilities of their members, the achievements of trade unions (protection of economic workers' interests, wage growth, labour protection, *etc.*); industrial education, which with the help of reports on production topics, interviews, lectures, staging, industrial exhibitions and production excursions.

Thus, the clubs of the first years of Soviet power played the role of centres of educational, agitation, political and educational work among the population. The analysis of their organization and activity shows that in their work the forms and methods of pre-revolutionary aristocratic unions were

²² Ghrycenko O. A. (1998) Klub [Club]. Narysy ukrajinskoho populjarnoho kuljturny [Essays on Ukrainian Popular Culture]. Kiev: UCKD, pp. 245–259.

²³ Ghrycenko O. A. (1998) Klub [Club]. Narysy ukrajinskoho populjarnoho kuljturny [Essays on Ukrainian Popular Culture]. Kiev: UCKD, pp. 245–259.

²⁴ Petrova I. V. (2008) Kuljturologhichni chynnyky rozvytku dozvillja v Ukrajinі pislja socialistychnoji revoljuciji [Cultural factors of leisure development in Ukraine after the socialist revolution], *Visnyk Derzhavnoji akademiji kerivnykh kadriv kuljturny i mystectv*, no.4, pp. 21–26.; Petrova I. V. (2005) Osoblyvosti funkcionuvannja sfery dozvillja u radjanskij Ukrajinі (1917–1939) [Features of Functioning of Leisure Sphere in Soviet Ukraine (1917–1939)]. *Visnyk KNUKiM*, vol. 13, pp. 117–124.

sometimes used, but they were modified and adapted to promote a new, communist way of life. Soviet clubs not only promoted the ideas of the Soviet government but also monitored the actions and sentiments of the people, gradually but systematically, cultivating the revolutionary spirit and political patriotism.

During the same period, the centralization of all political and educational work was carried out, the main governing body of which was the Main Political and Educational Committee of the Republic, which strengthened the link between cultural and educational work, the policy of the state and organizations²⁵.

In the early '30s of the 20th century, construction and opening of large club facilities, including trade union places of culture, was on-going. The motto of the All-Union Club Council 'Face to Production!' prompted the creation of cultural enterprises and cultural brigades. The main forms of work were red boards, showcases of social competitions, photo galleries of drummers, evenings on production topics, as well as 'blackboards', which, in contrast to 'red', criticized the lagging workers and the lazybones²⁶. In the late '30s, 20th century, reorganization of home reading rooms was carried out into collective farms for which special premises were built²⁷.

Prior to the outbreak of World War II, ideological and patriotic work aimed at strengthening the foreign policy of the USSR, the Leninist doctrine of just and unjust wars, and fostering a love for the heroic past became particularly important. The club establishments organized defense corners, in which, in addition to materials on the fighting traditions of the people, the heroism of the Red Army, disseminated manuals that helped to acquire elementary military knowledge; meetings with Red Army heroes were organized; defensive circles worked; military games were held; outreach and outreach activities unfolded. The motives of love for the Motherland, its protection, pervaded all genres of amateur art, which contributed to the readiness of the Soviet people to fight against the German occupiers.

During World War II, club funding decreased, their network halved, their club work re-orientated to patriotic and public education, to different forms

²⁵ Zharkov A. D., Chizhikov V. M. (ed) (1998) Kul'turno-dosugovaya deyatel'nost' [Cultural and leisure activities]. Moscow: MGUK. (in Russian); Pinalov S. A., Chernyavskiy G. I., Vinogradov A. P. (1983) Istoriya kul'turno-prosvetitel'noy raboty v SSSR [The history of cultural and educational work in the USSR]. Kiev: Vishcha shkola. (in Ukrainian)

²⁶ Pinalov S. A., Chernyavskiy G. I., Vinogradov A. P. (1983) Istoriya kul'turno-prosvetitel'noy raboty v SSSR [The history of cultural and educational work in the USSR]. Kiev: Vishcha shkola. (in Ukrainian)

²⁷ Zharkov A. D., Chizhikov V. M. (ed) (1998) Kul'turno-dosugovaya deyatel'nost' [Cultural and leisure activities]. Moscow: MGUK. (in Russian)

and methods (reading newspapers, essays, film demonstrations, photo meetings, 'lightning leaflets') of the events of the war, the propaganda of heroic deeds of Soviet people. Mobile clubs, agitation boats, agitation squadrons (on the fronts), agitation trains, agitation machines, agitation carts, agitation points, army houses and divisional clubs were created²⁸.

In the summer of 1945, the Transcarpathian region was annexed to the Ukrainian SSR, where radical socio-economic and cultural transformations began immediately. On July 22, 1946, the Central Committee of the Communist Party (b) of Ukraine (CCCP(b)U) and the Council of Ministers of the USSR adopted a resolution "*On Measures for the Development of the National Economy of the Transcarpathian Region for 1946*", which provides for the establishment of more than 500 clubs in the Transcarpathian region²⁹ the important ideological role of the clubs and the confidence of the authorities in the educational activity of the clubs in promoting communist ideas were confirmed.

On March 18, 1946, the Supreme Soviet of the USSR adopted a Five-year Plan, which was intended not only to restore the clubs destroyed during the war but also to significantly increase their number. Cultural institutions were built at the expense of the state budget and trade unions, collective farms, and industrial enterprises. At the beginning of 1951, the number of club facilities in the USSR significantly exceeded their pre-war number (1941 – 118 K, 1951 – 125.4 K, of which – 28.5 K in Ukraine). One of the most important documents that significantly influenced the organization of activities of club-type institutions was the resolution of the Central Committee of the Central Committee of the All-Union Communist Party (b) of Ukraine CCAUCP (b) "*On the Organizational and Propaganda Work of Party Organizations in Connection with the Adoption of the Law on the Five-year Plan to Restore the Development of the National Economy of the USSR in 1946–1950 years*". Clubs, reading rooms, houses and palaces of culture became the centres of mass lecture propaganda. In large industrial cities, specialized club-type establishments were opened like technology houses and houses of scientific and technical propaganda, the main task of which was industrial propaganda aimed at increasing the pace of implementation of the Five-year Plan. For this purpose, lectures were held in clubs, thematic evenings of scientific and technical direction were held, evenings on the exchange of production

²⁸ Zharkov A. D., Chizhikov V. M. (ed) (1998) Kul'turno-dosugovaya deyatel'nost' [Cultural and leisure activities]. Moscow: MGUK. (in Russian)

²⁹ Andreeva M. S., Vinogradov A. P., Pinalov S. A., Chernyavskiy G. I. (1970) Istoriya kul'turno-prosvetitel'noy raboty v SSSR. Sovetskiy period (1917–1969) [The history of cultural and educational work in the USSR. Soviet period (1917–1969)]. Khar'kov: KhGIK. (in Ukrainian)

experience, evenings of professions, exhibitions were organized, and circles were organized.

Important areas of club activities were scientific, educational and anti-religious work and aesthetic education. Amateur art teams were active at almost every club, which participated annually in the organized district, city, regional, republican and all-union surveys and competitions. In 1951, the Council of Ministers of the USSR adopted a Decree "*On Selection of Folk Talents*", according to which the republican committees for the arts and cultural and educational institutions were obliged to identify gifted youth, with the purpose of sending it to study in artistic and creative institutions and to work in professional artistic groups³⁰.

In order to increase the effectiveness of clubs, inter-collective councils for culture were created, the first of which was in Ukraine in the early '60s in the Novograd-Volyn district of Zhytomyr Oblast. Since the mid-1950s, many clubs have operated clubs of interest (amateur associations): youth political clubs, atheist clubs, associations for industrial interests, clubs of art lovers, native nature and others. The number of amateur participants at clubs, enterprises, collective and state farms increased; photo studios and film studios started functioning. The development of amateur creativity was stimulated by state and public organizations through the allocation of special funds, conducting creative reviews, competitions, festivals and exhibitions, etc³¹.

Thus, mid-20th century clubs continue to be centres of communist and patriotic upbringing, production, technical, and educational work. Socio-cultural activities were carried out only partially, the vast majority of measures were directed not to involve the society in cultural activities, but to promote the socialist way of life, Marxism-Leninism teachings and ideas of the Communist Party. All work was carried out in a planned manner, tightly controlled by state authorities. A positive aspect should be considered that, with great attention to cultural and educational work, the party congresses in their directives and prospective plans for the development of the economy provided for the material strengthening of cultural and educational institutions, including clubs.

³⁰ Pinalov S. A., Chernyavskiy G. I., Vinogradov A. P. (1983) *Istoriya kul'turno-prosvetitel'noy raboty v SSSR* [The history of cultural and educational work in the USSR].Kiev: Vishcha shkola. (in Ukrainian)

³¹ Klyusko E. M. (1999) *Kul'turno-dosugovaya deyatel'nost' naseleniya Rossii (may 1945–1985 gg.) : Teoretiko-metodologicheskii i istoricheskii aspekty* [Cultural and leisure activities of the population of Russia (May 1945-1985): Theoretical, methodological and historical aspects]. Moscow: MGUKI. (in Russian)

National universities of culture organized in the 1960s, whose main task was to raise communist consciousness of the masses, their ideological and aesthetic education, to promote new achievements of science, technology, and not to entertainment and culture. Operating within clearly defined ideological boundaries, Soviet clubs developed new approaches to promoting party ideas, the chosen strategy, and tactics of governing the country. Such work intensified during the periods of preparation and holding of congresses of the party, plenums of its central committee, a celebration of officially approved anniversary dates, evenings of labour glory, evenings in honour of Heroes of Socialist Labour, portraits of the winners of the socialist competition. Agitation and cultural teams were an important means of promoting the achievements of innovators and industry leaders³².

Since the mid-60s, systematic sociological research began, aimed at identifying the interests of workers in the field of culture, improving club services and providing the population with cultural institutions. Supporting-experimental clubs were created in each region (there were more than 50 of them in 1969), during 1966-1969 scientific and practical conferences were devoted to the improvement of club work³³.

In the late '60s in accordance with the Regulations "*On State Club Facilities*" operated the following types of clubs: the district house of culture, townhouse of culture, village house of culture, village club and car club.

The role of club organizers was taken over by trade union and Komsomol organizations, public authorities (councils, commissions and committees). At the enterprises, institutions, educational institutions, lectures, talks, excursions, collective visits to theatres and museums, concerts and evenings after the graduation; there were sports sections, amateur associations, health groups and amateur groups.

The end of the '70s was characterized by increased attention of the party and Soviet bodies to cultural and educational work. At this time, the Resolutions of the Central Committee of the CPSU and the Council of Ministers of the USSR "*On Measures to Further Improve the Cultural Service of Rural Population*" (1977), "*On the Basis for Further Development of Amateur Artistic Creativity*" (1978) and "*On Further Improvement of*

³² Klyusko E. M. (1999) Kul'turno-dosugovaya deyatel'nost' naseleniya Rossii (may 1945–1985 gg.) : Teoretiko-metodologicheskii i istoricheskii aspekty [Cultural and leisure activities of the population of Russia (May 1945–1985): Theoretical, methodological and historical aspects]. Moscow: MGUKI. (in Russian)

³³ Andreeva M. S., Vinogradov A. P., Pinalov S. A., Chernyavskiy G. I. (1970) Istoriya kul'turno-prosvetitel'noy raboty v SSSR. Sovetskiy period (1917–1969) [The history of cultural and educational work in the USSR. Soviet period (1917–1969)]. Khar'kov: KhGIK. (in Ukrainian)

Ideological, Political and Educational Works” (1979). Club management began to centralize: by the end of 1980, there were 6,000 rural centralized club systems operating in Ukraine designed to improve the conditions for socio-cultural activity of rural residents in small remote villages. The work of all clubs was carried out according to a single plan with the involvement of other cultural institutions and public organizations³⁴.

Thus, decisive in the activities of clubs 1960s-1970s of the 20th century was mass political work, production, technical and educational propaganda. Among the most common forms of club work were advocacy lectures, thematic nights (evening-meetings, portraits and evenings of combat and labour glory, evenings-rallies and evenings-reports), oral magazines and amateur art reviews.

In the 1970s and 1980s, the processes of ‘domestication’ of leisure began, clearly due to the improvement of the equipment of cultural home leisure; substantial and organizational backlog of public leisure forms, the inconsistency of club services to the needs of the population; and the growing role of amateur associations outside the club. As a result, public clubs were losing popularity and their attendance was decreasing. At the same time, disorganized amateur activity became widespread, especially in the youth environment. The forms of its manifestation are varied: teenagers and youth companies focusing on ‘street’ communication, youth parties, and ‘underground’ rock groups. Informal youth associations were spreading: hippies, punks, rockers, breakers and sports fans. Interest in informal amateur activity grew, clubs for running, dancing, and music arose; amateur activity has often grown into artistic creativity, acquiring the character of a home-based hobby that is realized in family circles and friendly companies.

Many of the tools, forms and methods used in Soviet clubs are still relevant today: theme nights, theatrical holidays, concert programs, club lounges, recreational games, festivals and children’s mornings, etc. Instead, such forms of club work as the days of revolutionary and martial traditions were losing their significance; People’s Universities; performances of agitation units, agitation theatres, agitation and art associations, agitation and cultural crews; evening rallies, evening rituals; reading aloud; discussion of newspaper publications, reference desk and other activities. Not used in club practice are such forms of visual propaganda as a satirical newspaper, information leaflets ‘Lightning’ (announcement of an urgent assignment, production victory or award of the collective of a prize or award), ‘Glory’

³⁴ Pinalov S. A., Chernyavskiy G. I., Vinogradov A. P. (1983) *Istoriya kul'turno-prosvetitel'noy raboty v SSSR* [The history of cultural and educational work in the USSR]. Kiev: Vishcha shkola. (in Ukrainian)

(glorification of worthy imitation), 'Anxiety' (signals about under-performance, backlog, failure to complete tasks); radio newspaper; campaigning corners; message boards; educational booth or poster.

Significant changes in the activities of clubs took place in the mid-1980's they are primarily related to socio-political changes in society. Abandoning such traditional areas of work as science, technology, ideology, party propaganda, clubs focused on leisure activities, focusing on the specific interests of visitors in their free time. In addition to the traditional ones, some clubs have started functioning informal associations: fan clubs, rock clubs, breakdancing and scratchboards, etc. The main functions of the club remained educational, enlightenment, creative, but began to pay more attention to leisure, communication and recreation, which form the basis of social and cultural activities of the clubs.

CONCLUSIONS

An analysis of the activities of Ukrainian clubs throughout their historical development allows us to reach the following conclusions. The perception of the club as an institute of culture was formed in England. The following types of clubs have been tried in English socio-cultural practice: taverns and coffee houses; clubs of interest (political, professional, literary and musical), clubs designed for multifunctional leisure activities. The main activities of the clubmen in English clubs were communication and leisure, so communication and leisure functions prevailed. The first Ukrainian aristocratic clubs (beginning of the 19th century) had the features of English clubs: the regulated nature of club membership, aristocracy, exclusivity, elitism and the availability of relevant documents governing the club. However, they systematically carried out cultural and educational activities among the population (folk readings, family evenings, theatre performances and concerts). Despite corporate elitism, the main functions of aristocratic Ukrainian clubs were not only communicative and leisure, but also cultural and educational, which gave impetus to the creation in the late 19th and early 20th centuries powerful people's houses, people's theatres, people's universities and 'culturally disadvantaged sections of the population'.

Clubs of the Soviet period, transformed from voluntary associations, promoted the ideas of the Bolshevik authorities. Soviet power used the club's capabilities and its potential; the ability to quickly transform into effective and efficient community education and education centres. Despite the clearly defined ideological framework, the transformation of the Soviet clubs from voluntary associations to public institutions of club type, whose activity is closely aligned with the political interests of the country; that the clubs of the

Soviet model became a kind of official representatives of local authorities, whose main task was to socialization, Sovietisation and politicization of traditional rural and urban leisure activities, attracting people to officially authorized and recommended by authorities of social and cultural activities, it should be noted that in Soviet times was very positive. In particular, new types of club-type establishments: cultural-educational and propaganda centres, houses of culture, rural buildings, reading-houses, mobile clubs, experimental and experimental clubs; new forms and methods of work: agitation courts, stage performances, agitation campaigns, live Newspapers, 'red' and 'black' boards, 'leaflets-lightning', evenings of labour glory, thematic evenings, amateur performances, radio newspapers; established scientific and methodological and personnel support of club institutions, their cinema and technical equipment, financing and material support and extensive infrastructure of club institutions, which allowed to cover all segments of the population.

Thus, analysing the historical way of formation and development of clubs in Ukraine, it can be noted that their activity has always been determined by the peculiarities of social, political and socio-economic processes.

SUMMARY

The article analyses the formation and development of clubs, reveals the positive achievements and miscalculations at different stages of historical development. It has been found that the traditional gatherings of young people are 'streets', 'musicians', 'evenings', 'parties' and 'dawns' as prototypes of domestic clubs. The first aristocratic clubs in the territory of Ukraine, according to the English model, appeared in the early of the 19th century and represented the characteristic features of English clubs.

In particular, the regulated nature of club membership, aristocracy, exclusivity, elitism, the availability of appropriate documents governing the club.

In the early of the 20th century, voluntary clubs have been transformed into club-type institutions funded and managed by public authorities.

The article reveals the activity of Soviet clubs, which is closely connected with the political interests of the country, and proves that the clubs of the Soviet model became a kind of official authorities in the field, whose main task was to socialize, Sovietize and politicize traditional rural and urban leisure, to involve officially approved and recommended forms of socio-cultural activity by the authorities.

The most widespread forms of club work of all periods of development outlined in the study are identified.

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MEMORY STUDY AND COMMEMORATION EFFECT OF MODERN UKRAINIAN FICTIONAL TEXTS

Iryna Rybalka

INTRODUCTION

In the past fifty of so years, the society has demonstrated an increasing interest in studying memory that has opened a certain epoch in this field of knowledge. Some researchers even dare to refer to this phenomenon as a “memory boom”. The boom started in late 1970s in sociology and has only begun to wind down at the turn on millennium¹. But the decrease of the interest to the topic among the sociologist has transformed into the “boom” of “memory study” in other humanitarian fields such as philosophy, psychology, culture studies, politics, public relation and even theory and history of literature.

The raise of interest to understanding the mechanisms of collective memory could be understood easily when taking into consideration “the decline of postwar modernist narratives of progressive improvement through an ever-expanding welfare state, nation-states turned to the past as a basis for shoring up their legitimacy. The decline of utopian visions supposedly redirected our gaze to collective pasts, which served as a repository of inspiration for repressed identities and unfulfilled claims. Without unifying collective aspirations, identity politics proliferated”².

“Memory studies” are one of the most pressing fields of interdisciplinary research today, the main purpose of which is supposed to study the collective and cultural memory of any society. One of the most urging reason for studying it is to single out the unifying elements for the society as a group of individuals. Collective memory, that is manifested and fulfilled in traditions, beliefs and myths cultivated in society, occupied the minds of mainly historians, sociologists and psychologists until recently. The results of this kind of researching is broadly used in public relation, politics, sociology and so on. At the present day, when the relationship between different fields of knowledge becomes vaguer, this phenomenon has also interested the literary scholars. They tend to use fictional texts as a source to collect the information

¹ Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy (2011). *The Collective Memory Reader*. Oxford University. (in English) P. 3.

² Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy (2011). *The Collective Memory Reader*. Oxford University. (in English) P. 4

about the common past as well as to treat the texts as a certain “places to memory” or a commemorative practice.

The aim of our research is to study the peculiarities of the author’s literary understanding and representation of the collective memory images. We also make an attempt to analyze of the commemoration as a plot structural element of the novel “I wish”³ by the well-known Ukrainian writer and journalist Iren Rozdobudko.

1. Maurice Halbwachs and his followers in developing the Collective memory theory

Starting from 1970s, we seemed to enter a new period in humanitarian science: there seemed the contemplation of memory to be increased. Many scholars refer to that period as a “memory boom” now. This new epoch in study memory as a social phenomenon began to end since the turn of millennium. How the “story” of memory study began? “Nevertheless, modern perspective on memory and historicity are profound different from much of what came before (though differences are not as absolute and exclusive as they are often portrayed). Part of the change in our view of the past – and of history and memory as ways of framing it – might be characterized as emanating from the triumph not only of the idea of progress but also of the associated “logocentrism” of the Western modernity – the valuation of reason and rationality over other criteria. In terms of memory, this has involved a shift from an emphasis on knowledge from the past about how to do things to an emphasis on knowledge about the past that certain things happened”⁴.

For our research we used the methodological basis developed by the well-known French sociologist M. Halbwachs. His work “Les cadres sociaux de la mémoire” (“On collective memory”) was published in 1925. He claimed any society has its own collective memory and this type of memory depends upon the “cadre” or framework within which a group that constitutes the society. This fruitful contribution to the sociology was applied to other humanitarian fields such culture study or psychology, theory or history of literature and so on.

According to M. Halbwachs, there exists not only the memory of an individual, but there could be singled out so-called group memory. The last can exist outside of an individual awareness. Thus, an individual’s recognition of the society past coincides with this group consciousness of that very past. People express their memory by means of commemoration in their culture. He insisted the historical memory is a combination of pre-scientific, scientific,

³ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian)

⁴ Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy (2011). *The Collective Memory Reader*. Oxford University. (in English), P. 8.

quasi-scientific and extra-scientific knowledge and collective representations of a common past. In this re-teach, collective memory stands out as an important factor in the social, ethnic, national self-identification of a group and cannot be equated with the official version of history that is treated as an artificially constructed ideological version of the past, its purpose is to manipulate the public mind⁵.

This idea was developed in a number of studies, but they were carried out much later. For example, there has been proved that the basis for such an interpretation of this collective memory concept was the idea that each generation “rewrites” history according to the imperatives of the present to contribute to a better understanding of both the past and the present⁶. A. Kleitman, in “The Age of Commemoration: The Mnemonic Foundations of Socio-Cultural Identity” emphasizes that the remembrance should be understood as “a mirror of our identity and an archive of the truth about us”⁷.

So, the longing to know the “true past” is an inalienable and essential part of the identity and self-comprehension of any modern society. The phenomenon of commemoration (i.e., the process of memorization – an action, or a ceremony, etc. that makes people remember and show respect for an important person or event in the past) is an important element in the social processes of modern culture⁸. Creation of monuments, museums, determination of outstanding dates, holidays, mass events. According to P. Nora whose name is associated with the new history, the mechanism of reactivating the experience of the past is “places of memory”, that are so-called sacred objects, architectural structures, events, phenomena, associations, etc. P. Nora has directed “Les Lieux de mémoire” (“The memorial places”), the three volumes work enumerating the places and the objects which could incarnate the national memory of the French people⁹.

One of the most important forms of commemorative activities is the set of historical events and dates that are imprinted in a certain way into the whole nation’s collective memory. M. Halbwachs in his work “Collective memory”

⁵ Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy (2011). *The Collective Memory Reader*. Oxford University. (in English). P. 140–150.

⁶ Kleitman A., Scheglova L. *Modusy zabveniya v ontologii kultury* [Modes of oblivion in cultural ontology]. Volgograd: FGBOU VPO VAGS. (in Russian)

⁷ Kleitman A., Scheglova L. *Modusy zabveniya v ontologii kultury* [Modes of oblivion in cultural ontology]. Volgograd: FGBOU VPO VAGS. (in Russian)

⁸ Vasileva E.O. (2009) Rol praktik kommemoratsii v protsessah organizatsii sotsialnogo prostranstva sovremennogo iskusstva [Commemoration role in the process of modern society space organization]. *Vlast*, no. 6, pp. 40–43.

⁹ Rybalka I.S. (2015) Memory studies sovremennogo ukrainskogo romana. [Memory studies of modern Ukrainian novel] *Tomskiy zhurnal lingvisticheskikh i antropologicheskikh issledovaniy*. Vol. 3, no. 9, pp. 107–113.

states: “History divides the sequences of centuries into periods, just as the content of tragedy is divided into several acts. But in a play the same plot is carried from one act to another and the same characters remain true to form to the end, their feelings and emotions developing in an unbroken movement. History, however give the impression that everything – the interplay of the interests, general orientations, modes of studying men and events, traditions, and perspectives on the future – is transformed from one period to another. The apparent persistence of the same groups merely reflects the persistence of external distinctions resulting from places, names, and the general character of the societies. But the individuals composing the same group in two successive periods are like two three stumps that touch at their extremities but do not form one plant because they are not otherwise connected”¹⁰. Therefore, for collective memory, it is not chronology and eventuality that becomes important, but all that distinguishes one period from another. Since the memories of the significant past events are reflected through the personal experience of each individual and his or her own reality, they are always selective in itself that serves as a kind of demonstration for the actual needs in the society at each certain period¹¹.

2. Fictional text and its commemorative effect on the modern Ukrainian history

It is doubtless that creating a text can also be called commemoration when it comes to a documentary, scientific or journalistic work. The texts of these kinds are a kind of past eras witnesses and are associated not only with the physical, but also with the virtual culture space. A fiction text can also be treated as one of the forms of expression of the collective and cultural memory, since it bears the imprint of its time (modern scholars emphasize that a fiction text can even be considered as a kind of real documentary)¹². However, it should be noted that commemoration in this very case meets some artistic interpretation. One should keep in mind that these texts represent the collective memory irrationally. The artist-writer is interested not only in the chronology or sequence of events (and sometimes they do even not care about it at all), but in the feelings and emotions of their characters at this or

¹⁰ Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy (2011). *The Collective Memory Reader*. Oxford University. (in English) P. 143.

¹¹ Vasileva E. O. (2009) Rol praktik komemoratsii v protsessah organizatsii sotsialnogo prostranstva sovremennogo iskusstva [Commemoration role in the process of modern society space organization]. *Vlast*, no. 6, pp. 40–43.

¹² Zverev V. V. (2003) Novyye podhody k hudozhestvennoy literature kak istoricheskomu istochniku [New approaches of the fiction as a historical source] *Voprosyi istorii*, no. 4, pp. 161–166.

that moment of society development. But still fictional texts are perfect commemorative acts to refresh the emotional and irrational sphere of humankind. The point is that fiction is able to alter the status of memory, because the past of any country (i.e. a state, community, or nation group) is considered as a kind of foreign society not just of the long time ago, but because it is often far away. For example, the rate of immigration has been quite high in the recent fifty years, so reading “right” fictional texts can help the residents of the “the new world” to associate themselves as a part of the old community they try to assimilate in.

After brief considering the basics and the history of “memory studies” we can pass to the discussion of the essential topic of Ukrainian memory and its representation in modern Ukrainian fiction. It seems to be logical to start with historic items. So, there are some very painful periods in Ukrainian history of the XX and XXI centuries defining our collective memory. Among them we can single out the most devastating and ruinous: Holodomor, the Second World War and the present day situation in the East of our country. The first two episodes of our history are well commemorated and widely discussed all over the world to demonstrate to the Communistic regime in the Soviet Union. There horrible and shocking event took place in the first half of the XX centuries. The second part of Soviet Ukraine especially 60s, 70s and 80s are rarely remembered in commemorative practice, except the Chernobyl NPP accident that meet wide commemoration all over the world in the context of environmental protection. Our Soviet history of the second half of the XX century is full of other less amplitudinous but very important events that as well form our collective memory. These events were either widely adverted all over the USSR or classified. Among the widely adverted ones are Space explorations, Baikal-Amur mainline construction, Olympic Games. The above mentioned achievements demonstrated and stimulated the outstanding raise in economics and politics proving the popular moto of that time “Faster, higher and stronger”.

The other events which were highly class and some are still classified might have ruined the image of the Soviet Union as a strong but peace loving state. Here we could enumerate all kind of military conflict happened in any corner of the world of the period. They were everywhere nevertheless they were nowhere. The only conflict that could be discussed open was the civil war in Afghanistan, but the real scale of the Soviet participation in that war was known to a small group of people.

Mentioning the classified reality of that time we are supposed to tackle upon the so-called “defitsit”¹³ or the lack of the simplest everyday products

¹³ Lack of something of common use in the USSR: shampoo, sugar, towel etc

and the ordinary people attempt to get these things. These people were treated as criminals and always sentenced to prison. The other very specific crime of that time was desire to utter one's own point of view that was at odd of the general Communistic ideology. They did their best to cope with this kind of unlaws and they also tried to do it secretly.

This list can be continued on and on, but the purpose of our study is not to remember all the painful and ruinous moment in Soviet Ukraine history. We just emphasize that classified information in some certain amount was being spread in the Soviet community. People discussed it in their kitchens in the evening surrounded by very close and reliable friends. This terrifying information was whispered and murmured all over. It was a kind of rumors and gossip – no one could trust it but everybody felt it was true.

All those good and bad moment formulated the collective memory of the present day Ukraine. Understanding the roots of this part of our collective and cultural memory we can explain the current events and transform them for better. We should not only know the bare and objective facts about the events happened but we should reflect those emotions because our irrational and subjective experience influences much on our deeds and actions at the present day. These emotions determine our reaction and decision we make in a lot of situations and the awareness of the emotions can predict and explain our reaction. Here we can also apply the fictional texts on the topics to perceive and realize the emotions and feeling of that time people as it might determine the present day emotional atmosphere. So fiction can be used as a commemorative act to actuate our susceptibility to that kind of feeling.

3. Irene Rozdobudko's novel "I wish"¹⁴ as a commemorative action on Soviet community

So, here in this abstract, as we have already mentioned, we aim to read and analyze the novel of a talented Ukrainian writer and journalist Iren Rozdobudko to actuate those feeling and emotions. It is supposed it helps in some way to realize the reasons of the current problem in Ukraine. Considering of Iren Rozdobudko's novel "I wish" (2012) in the context of this approach we have tried to determine whether this belles-letres text is part of a collective socio-historical memory. For the researching in this field, the work is perspective, first of all, in terms of its representative capabilities and opportunities. The fantastic plot of time travelling in the past, to be more concrete in 1980, motivates and provokes the detailed description the Soviet community of that time. This allows the author to develop the cultural matrix of the entire Soviet generation, and thus to utter the important problems of the

¹⁴ Hereinafter I. Rybalka's translation

modern society. This specification is a certain reflection of the forming the new phenomena of the Ukraine today. Thus, important problems of modern society are highlighted and declared. Thus relevance of our study is obvious both in the context of theory and history of literature as well as in cultural aspect of memory studies¹⁵.

Iren Rozdobudko graduated from the Kiev National University, journalist department. At the beginning of her carrier she worked as a telegraphist in the Donetsk section of TASS, then she worked at Donetsk Metallurgical Plant newspaper, as a journalist and tried her hand if reading the news at a radio. She moved to Kyiv in 1988, where she worked in the Rodoslav newspaper, as a corrector for the Suchasnist magazine. They invited her as a columnist to the first and third channels of the National Radio Company, a columnist for the Vseukrainsky Vedomosti newspaper, and deputy editor-in-chief in the journal Natalie, the chief editor of Caravan of Stories. Ukraine and a journalist in the journal Academy. She is the author of more than fifteen works that met great recognition among readers. She was awarded with two prizes in literature in 2005 and 2012. She is a screenwriter of seven films as well.

Irene Rozdobudko's creation has already become part of the modern Ukrainian literary process. Her work attracts the attention of both book critics and theorist of literature. Researchers are interested in her ability to create detective stories (N. Galushko, O. Prikhodchenko, L. Starovoit). Some of them conduct detailed study in her characters' psychology (N. Gerasimenko, L. Gorbolis, Yu. Sokolovsky). The gender aspect of her texts also attracts the attention of literary scholars (G. Avksentieva, N. Pavlyuk, K. Tkach). In the contrary, the author's works in the aspect of "Memory studies" have not rarely been touched upon. So here the attempt to have a close look at Irene Rozdobudko's novel "I wish" is made¹⁶.

To continue discussion of the well-known Ukrainian writer and journalist's novel we should have some brief review of her biography as it may actuate some important items for analyzing the above mentioned work. So Irene Rozdobudko is a representative of a generation that was brought up in "zastoy" time¹⁷, She witnessed years of "perestroika"¹⁸. She continued her

¹⁵ Rybalka I.S. (2015) Memory studies sovremennogo ukrainskogo romana. [Memory studies of modern Ukrainian novel] *Tomskiy zhurnal lingvisticheskikh i antropologicheskikh issledovaniy*. Vol. 3, no. 9, P. 107.

¹⁶ Rybalka I.S. (2015) Memory studies sovremennogo ukrainskogo romana. [Memory studies of modern Ukrainian novel] *Tomskiy zhurnal lingvisticheskikh i antropologicheskikh issledovaniy*. Vol. 3, no. 9, pp. 107–113.

¹⁷ the period in the Soviet Union history between the middle 60s and the beginning of 80s

¹⁸ the period in the Soviet Union history starting in 1985 and lasting up to the demise of the Soviet Union

carrier as the journalist in the regional newspaper in the first years of independent Ukraine formation. It should be noted that the most of her fictional texts have been written in Ukrainian and Russian, – this makes it possible for more readers to get acquainted with her works as it is very important to read original text. Irene Rozdobudko has not translated her works she has create them in tow languages simultaneously.

The generalized and symbolic depicting of “zastoy” period is the first thing that attracts a reader’s pays attention. This period is shown in the novel through the alembic of childhood memories, but at the same time the author describes her past emotions as an adult. After about twenty years the main character Veronika Ivchenko is able to differ between bad and good moments of her young year. Such a binary presentation of the same event enhances the commemorative effect and provokes the reader to review that distant time. So, for example, 1980 was remembered in history as an eventful year: the Olympics, “Subbotnik”¹⁹ held all over the USSR in honor of 110th anniversary of Lenin’s birth; however, the main character’s memory flashes in: “< ... > Vysotsky died. There was a war in Afghanistan”²⁰.

4. Reading “I wish” by Iren Rozdobudko as a commemorative text

As it has already been mentioned, the past events are presented in the novel twice – in memories of a small girl that have survived for years and from the adult person’s point of view. It is often underlined though out the text that very person is a well-experienced and intelligent journalist who knows about the reasons of those events and understands the effects they had for an individual’s life and the whole community. It is difficult to overestimate the difference in such interpretations: they acquire a special ideological and aesthetic colouring and provoke deep thinking to realize the changes that met the moral standards.

Commemorative effect of the novel is also enhanced by means of using two types of narrative strategies: the narration is conducted in rotation from the first person and from the third person, while subjectivity of the text is maintained. The reader feels to be inside of the story and, at the same time, has the opportunity to look at it from the outside. The author manages to level the distance between the narrator and the character, which contributes to the cohesiveness of the ideological sphere of the text. It becomes clear that the

¹⁹ Voluntary collective work to performance of some socially useful work assignment. The above mentioned event took place in April 1980.

²⁰ Rozdobudko I. (2012) *Eslī by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

internal point of view of the thirty-year-old Veronika Ivchenko²¹, whose childhood passed in the 80s of the last century, is devoted to the complex of ethical and worldview imperatives of a resident of post-Soviet space at the beginning of the 21st century.

It seems to be necessary to make a brief review of the fantastic plot of the novel. So, the thirty-one journalist, a talented one, by the way, is invited to work on TV. Her ambitions make her try to overcome her oral speech problem. When a child she was frightened by and old pedophile and as a result she stutters when she speaks now. Following the advice of a good specialist she goes to her home block of flats and finds herself in her past. She meets herself in her young years gets acquainted with her parents. She does her best to change her past to prevent some bad moments in her present. At the very end she realizes that her childhood memories are all wrong and her speech problems are caused by her parents' conflict: a seven year girl saw her father with her mother's dear friend when they were having sex in her parents' bedroom. The father reaction on his daughter entering the room was shocking – he hit his child against the wall and that very accident caused her problem with the speech. The main character completely forgot about this event as it was easier for her to believe that she was harmed by a stranger than by her father. Another very important conclusion done by the main character is that her happy Soviet childhood is fiction created by the society.

It is presumptuous to state that the novel presents the reader some factual information about that epoch, but as for the emotional and cultural atmosphere of that time is recreated in the text in a very vivid manner. The binary opposition “pretense / tragic pathos” – this is the framework with which you can describe the events “remembered” by the main character. Thus, the historical antitheses presented in the novel are the following: the Olympic Games – the war in Afghanistan, the anniversary of the birth of Lenin – Vysotsky's death, is a peculiar system of moral standards that coordinate Veronica's life. These events are used as a tool for criticizing Soviet realities and emphasize the author's desire not to ignore those “sensitive issues” while interpreting our past.

The topic of exposing our totalitarian past is developed from the main character's subjective perception – everything is described as seen with Veronica's eyes – the only difference makes her age: “< ... >they only knew

²¹ The novel is devoted to Veronika Ivchenko. She is the main character, who is successful in her journalistic career, family life. There is only one step left to her triumph on television. The only thing that stops her from her new activity on TV is her problem with oral speech: she stutters. Her psychiatrist advises her to go back to her past in order to live her happy future. So in the process of combating a child's defects, she tries to have a look at difficult childhood and to face the fear.

about the games because they used to broadcast the Olympic bear with rings on the belt on the screen. I categorically did not like it – it was too flat, big, with a banal smile and with round artificial eyes. From the child’s point of view it was rather unsympathetic”^{22, 23}. The objectification of the general event goes gradually and occurs through the secondary characters’ utterances “< ... > and all the junk people has already been taken a hundred kilometers < ... > it seems to me that this is correct: there is no sense to demonstrate the prostitutes and homeless people to the foreigners”^{24, 25}; “I don’t know how it was there, but I had seen enough of bribery, theft and total slovenliness ... < ... >. Unclad walls were poured with white paint to look like done with some white tiles, well, so that the state officials authorized the construction completed. I thought: they’ll notice. Far from it! Noticed and accepted”^{26, 27}. The semantic intensity is enhancing against the background of the official interpretation of the events: “July 19, 1980 – the Olympic Games were held in Moscow, they were boycotted by 45 countries < ... >. The USSR leaders considered these games as an important ideological action. Moscow needed to be demonstrated as a showcase of socialism to the whole world. The idea to boycott the Olympic Games belonged to the Great Britain, Canada and the USA as a protest against the invasion of the Soviet troops in Afghanistan and the persecution of Soviet dissidents”^{28, 29}. This approach to the presentation of the same event contributes to a certain ironic effect, which is felt literally from the very first mentioning of it.

The Olympic Games pathos is opposed to the real tragedy of the war in Afghanistan – a great number of Soviet people were killed there. It should be noted that in the novel these two historical episodes are mentioned in the general context, but the emotional assessment of this sorrowful page from the Soviet history remains unchanged. “Afghanistan ... From this distant and strange country, which was called “Afghanistan” in the courtyard, at the end of that terrible summer they brought a coffin with the body of Aunt Nina’s

²² I. Rybalka’s translation.

²³ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

²⁴ I. Rybalka’s translation.

²⁵ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 118.

²⁶ I. Rybalka’s translation.

²⁷ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 120.

²⁸ I. Rybalka’s translation.

²⁹ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

son, and she immediately grew old <...>^{30, 31}. Only the ideological perspective varies: “<...> we fulfill our ideological duty <...>. We? Our oughts? Do you owe someone? <...> Our guys die as heroes there! <...> But they do it for no reasons!”^{32, 33}.

The current situation declines the necessity for this kind of justification, since five decades completely eliminate this need. M. Halbwachs explains it by the fact when the time passes any society finds new resources and chooses new goals³⁴. So the majority of the post-Soviet states have chosen the way of harsh criticism and condemnation of the Soviet period of their history, knowing the results of that senseless war, they do not accept the policy of heroization of the participants of that war, but rather emphasize its senselessness and illegality.

V. Vysotsky’s death and the anniversary of “of the world proletariat’s leader’s” birth are presented within the same vertical of moral standards. The mention of these events in one context provokes the reader to comparative understanding and rethinking of the two episodes, since in the novel these memorable dates received all-Union, national significance: the death of the “singer of sincerity in insincere time” and the birthday of the “leader of the revolution”³⁵. “Vysotsky’s death almost every person in the block of our flats realized as his or her own – all the day long and everywhere one could hear bad tape recordings of his songs through the windows, which turned into an incredible cacophony. The men nervously smoked and poured some vodka into their glasses under the wooden roofs of the pavilion in our yards”³⁶.

The author recreates this situation to emphasize the absurdity: on the one hand – “incredible cacophony” in memory of the one who could not stand the falsity, and on the other – the “grandiose subbotnik”, which united millions not “for the idea”, but for “three bottles of vodka”: “<...>The fit old man, who had been sleeping and spending his night’s on the bench outside, remembered another solemn event – the one hundred and tenth anniversary of Lenin’s birth, <...> and the grand subbotnik in honor of this event, 150 million people

³⁰ I. Rybalka’s translation.

³¹ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

³² I. Rybalka’s translation.

³³ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 123.

³⁴ *The Collective Memory Reader. Jeffrey K. Olick, Vered Vinitzky-Seroussi, Daniel Levy. Oxford University Press, 2011 – Social Science – 497 pages, – P. 140-147.*

³⁵ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

³⁶ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 63.

took part. And he mentioned three bottles of vodka they drove garbage and litter out of the town together with his fellows³⁷.

The evolution of the main character's attitude towards her present life is obvious, after her "personal meeting" with the Soviet past: "< ... > his own suspended animation and indifference is the suspended animation of a whole community of intelligent people who thought "bollocks to that!" about everything around them. They cared just about to stuff with food and clothes their dwelling^{38, 39}. It seems to be important to underline that the main character comes to these conclusions only after she personally succeeds in "meeting the past" in real time. The author stresses in this way that is impossible to perceive those feeling and emotions at the present day. That is why suspended animation of many people today still continues.

The main character's thoughts about the well-known events of that distant 1980 turns into the conclusion: "A human being forgets the bad past very quickly"^{40, 41}. Researchers of human memory functioning single out three possible causes of the phenomenon to forget ruinous past: philosophical – anthropological, sociocultural and psychological⁴². Iren Rozdobudko tends to explain this by the natural protective mechanism by the human mindset: "We only remember the good. Sausage by "rup"⁴³ and twenty", milk sold in a glass bottle of "twenty two", of course, kopecs ... Absolute calmness and indifference, a pause in the Soviet history called "zastoy"⁴⁴. Some ironic hints can be found in this passage indicating that 1980 was not chosen by chance. In the fiction world of this text, it acquires the function to project some modern ideas about the USSR as a whole.

The commemorative effect of this novel by Iren Rozdobudko can be clearly seen though comparison of the similar images of the past and the present: "I looked at the shelf. There stood a glass jar of hand cream and a bottle of Bulgarian shampoo "Rose". I grinned: if I want to have a bath normally and wash my hair, you will need to return to the twenty-first

³⁷ Rozdobudko I. (2012) *Esl'i by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 212.

³⁸ I. Rybalka's translation.

³⁹ Rozdobudko I. (2012) *Esl'i by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 211.

⁴⁰ I. Rybalka's translation.

⁴¹ Rozdobudko I. (2012) *Esl'i by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 211.

⁴² Kleytman A., Scheglova L. *Modusy zabveniya v ontologii kultury* [Modes of oblivion in cultural ontology]. Volgograd: FGBOU VPO VAGS. (in Russian)

⁴³ "rup" is short and a bit vulgar for a ruble.

⁴⁴ Rozdobudko I. (2012) *Esl'i by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian). P. 212.

century!”^{45, 46}. But latter Veronika feels bitter insight that comes instantly: “After having a bath with avocado oil based foam-cream and washing my hair with some Austrian shampoo that is supposed “to double its volume”, < ... > all this seemed so distant and no less strange than this unusual summer. If she could have got all this stuff in a large bag and take them to the place where the smell of Pomorin toothpaste <...> were the symbols of the child unconditional joy If she could throw it all in the middle of a cluttered kitchen and say – Look, take it all! This is what you spend your crazy days and hopeless nights wishing and desiring it”^{47, 48}. Destruction of the established axiological system of the main character Veronika Ivchenko leads to her enormous psycho-emotional stress: old standards have no values any more, they are ruined – but there are still no new ones! The positive symbolism of the past has lost its semantic meaning, since the character still reinterprets the nature of that “calmness” and “moral perfection”. All this happens simultaneously with the awareness of the new moral standards of the present day. Thus, the 1980s are presented as a kind of “disease beginning”. Hence today we face only its consequence and continuation⁴⁹.

To sum up everything above mentioned it would be necessary to note that using the “entertaining topic and genre”, I. Rozdobudko managed to reveal the causes of moral degradation of the modern society formulated on the post-Soviet territory at the beginning of the 21st century. Commemoration as a structural element of this fiction allows the author to create peculiar “places of memory” and thereby increases the artistic and ideological value of the work: to raise it from the level of an ordinary female novel to the level of intellectual prose. Another theoretical aspect of this very novel touched upon in the text prove the presumption about the usage of the fictional text as a commemorative action worded in the second part of the research seems to be proved.

CONCLUSION

The so-called “Memory study” is a very popular approach among the scholars to study different aspect of human being life. The thesis uttered by

⁴⁵ I. Rybalka’s translation.

⁴⁶ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian) P. 90.

⁴⁷ I. Rybalka’s translation.

⁴⁸ Rozdobudko I. (2012) *Esli by* [I wish]. Kharkiv: Klub simeynogo dozvillya. (in Russian) P. 215.

⁴⁹ Rybalka I.S. (2015) Memory studies sovremennogo ukrainskogo romana. [Memory studies of modern Ukrainian novel] *Tomskiy zhurnal lingvisticheskikh i antropologicheskikh issledovaniy*. Vol. 3, no. 9, pp. 107–113.

the famous French sociologist Maurice Halbwachs in the 1920s allows us to have a close look at the nature of the present day people's mindset.

Thus, in the abstract we tried to analyze the fictional text as a commemoration and to prove that it could possibly be used in commemorative practice. We also have realized the fiction appeals to reader's emotions and feeling and creates the general atmosphere of this or that historical moment rather than stating fact, remembering names of the participants and speaking about its consequents.

The "Memory study" analysis of the novel "I wish" by a well-known Ukrainian writer Iren Rozdobudko actuates the presumption on the commemorative effect of the fiction text. The author manages to fulfill the general atmosphere of the indifference in the Soviet Society in 1980s though the fantastic plot of her novel. This story of some two summer weeks in 1980 retold on behalf of a thirty-one year old woman who happened to find herself as an adult in her childhood. The main character had an opportunity to influence and change her past as "she wished". This time travelling leads to the main character's understanding the wrong moral standards she had borrowed from her past. Veronica is shocked to realize that her every happy memory from her childhood have nothing to do with that real life. She is supposed to think about some other moral standards to motivate her present life.

Consequently we seem to have proved that commemoration is knitted into the text of the novel as a structural element. It allows the author to work out specific "place of memory" and thereby enlarges the artistic and ideological value of the work: an ordinary female novel turns into a good piece of intellectual prose. Another theoretical aspect of this very novel touched upon in the text prove the presumption about the usage of the fictional text as a commemorative action worded in the second part of the research seems to be proved as well.

SUMMARY

This abstract studies a novel by famous modern Ukrainian novelist Iren Rozdobudko with the help of the approach worked out by so-called "Memory studies". The use of commemoration in fiction is touched upon as well. Here the analyses of the novel "I wish" written by the famous Ukrainian writer Iren Rozdobudko is presented as a practice of the Soviet Union commemoration. The novel was chosen because of the strong and clear opposition of the past and the present that allows treating it as a kind of "memory place". The work presented can be used as a basis for further analyses of fiction as a type of commemoration.

It's known that one of the most important types of commemorative actions is the use of the dates. The choice of the dates can influence much on the

perception of the fictional text. Thus Iren Rozdobudko stresses several important and meaningful events of 1980. Among them are the Olympic Games of 1980 and the very beginning of the Afghanistan conflict. These historic events are presented in opposition: a happy one and a sorrowful one. The other two events of 1980 opposed in the text describe cultural reality of that time: the death of Vladimir Vysotskiy and so-called All-Union Subbotnic.

It should be underlined that the author uses no historic names and concrete dates. It contributes to re-creation on the general emotional atmosphere of that time. It appeals to irrational of the reads provoking commemoration of the event described on the other level of perception.

The main character, a thirty-one year old journalist Veronica Ivchenko found herself in 1980. It is the time when she was only seven. She understands everything happened at that period being adult person. It helps her to rethink all the moments and to influence them to change her present. That leads her to understanding that the beginning of the Afghanistan conflict was more important for the people around her than the Olympic Games popularized in the society, the death of famous V. Vysotskiy shocked the community much and people continue remembering him, but nobody remember about the All-Union Subbotnik that was written about in every newspaper and magazine of that time.

We would like to understate that the “entertaining fantastic plot” worked out by Iren Rozdobudko allowed to expose the moral standard degradation of the modern society in the former Soviet Union countries in the early twenty-first century.

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DISCURSIVE PRACTICES OF MEDIA CULTURE: CULTURAL ASPECT

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INTRODUCTION

In the broadest sense, the intrinsic function of culture is to preserve the different values and achievements of Humanity. Therefore primarily, by its ontological essence, culture is a medium for enunciation of a meaningful existence and it is a very essence of a meaningful existence. Therefore, a language must arise by means of which the sphere of values itself becomes recognizable and meaningful. The language of intrinsic ideas of a given culture, which organizes and directs its sense-making function, becomes such a language (and it is characteristic for every possible historical type of culture).

Namely in the aspect of “meaningful enunciation” in the culture of the new millennium an assumption was made that the discourses and discursive practices used in the field of contemporary humanitaristics, in particular in cultural sciences, create a homogeneous field and have a clear set of established characteristics which would be interesting to analyze.

First of all, we proceeded from the fact that a *discourse* means a verbally articulated form of objectification of the content of human consciousness in this particular era, governed by a type of thinking, dominant in a certain socio-cultural tradition.

This concept gains a particular importance in the problematic field of *cultural studies*¹. Just here discourse appears in the focus of attention, undergoing some kind of renaissance of meaningfulness: the discourse is considered to be a significant element of socio-cultural interaction. Thus, first of all, discourse is a language, immersed into a life and social context. But it is not an isolated textual or interlocutory structure. In the process of development of discursive analysis as a specific field of humanitarian researches it becomes clear that the meaning of discourse is not limited by written or oral language, but it also determines extralinguistic semiotic processes.

Thus, for adequate analysis of thinking activity, it is extremely important to fix the boundaries of the discursive sphere. The space of **discursive**

¹ Режим доступу: https://uk.wikipedia.org/wiki/Культур_ологія

practices² is associated with an ability to combine different-time, diverse, unpredictable, uncontrolled, spontaneous, etc. events in speech, reproducing the dynamics of the real.

Each type of **discourse** is based on a specific system of key aspects of cognition grounded in acquisition, use, storage and production of knowledge, each of them receives a specific semantic content in a particular discursive practice.

A **cultural discourse**³ is constituted as a discourse of awareness of culture in the aggregate of its comprehensive historical forms. It reconstructs the cultural universe (the “picture of the world”), which defines a holistic worldview of a person of a certain historical period. The article contains the analysis of interdependencies of the elements of discourse in the aspect of a unique phenomenon – a modern **media space**.

1. Mass media: a system of related types of discourse in the problematics of contemporary cultural studies

Beginning its history since Antiquity, the concept of “discourse” takes the position of one of the most important modern thinking concepts.

The first concept of discourse as a certain definition in the scientific debate was introduced by Roland Barthes: “We shall therefore take language, discourse, speech, etc., to mean any significant unit or synthesis, whether verbal or visual: a photograph will be a kind of speech for us in the same way as a newspaper article; even objects will become speech, if they mean something”.

H. Marcuse introduced the “scientific fashion” of discourse, using this term in his work *One-Dimensional Man*. Quoting R. Barthes as an authority, G. Marcuse uses his conception and interpretation of discourse. After H. Marcuse’s book gained a worldwide popularity, the discourse became the most widely accepted concept in the theories of society. In 1969, two French researchers continued to elaborate the theory of discourse. First of all, it is the doctrine of M. Pêcheux, who bases himself on the ideas of L. Althusser about ideological formations and M. Foucault theory of discursive formations. It should be noted that R. Barthes and H. Marcuse concept of discourse gave rise and was completely assimilated by M. Foucault’s concept of discourse. However, in his turn, M. Foucault also had a great influence on the ideas of R. Barthes.

The most appropriate for our study is M. Foucault⁴ theory. In order to understand the completeness and semantic diversity of the term “discourse”, we’ll cite a rather broad definition of the thinker: “The term discourse, which

² Режим доступу: <https://uk.wikipedia.org/wiki/Дискурс>

³ Режим доступу: <http://oaji.net/articles/2017/294-1521575884.pdf>

⁴ Режим доступу: https://uk.wikipedia.org/wiki/Мішель_Фуко

I have used and abused in many different senses: in the most general, and vaguest way, it denoted a group of verbal performances; and by discourse, then, I meant that which was produced (perhaps all that was produced) by the groups of signs. But I also meant a group of acts of formulation, a series of sentences or propositions. Lastly – and it is this meaning that was finally used (together with the first, which served in a provisional capacity) – discourse is constituted by a group of sequences of signs, in so far as they are statements, that is, in so far as they can be assigned particular modalities of existence. And if I succeed in showing, as I shall try to do shortly, that the law of such a series is precisely what I have so far called a discursive formation, if I succeed in showing that this discursive formation really is the principle of dispersion and redistribution, not of formulations, not of sentences, not of propositions, but of statements (in the sense in which I have used this word), the term discourse can be defined as the group of statements that belong to a single system of formation; thus I shall be able to speak of clinical discourse, economic discourse, the discourse of natural history, psychiatric discourse”.

And further: “The conditions determining the elements of such redistribution (objects, modality of statements, concepts and thematic choices) we call the rules of formation – rules of application (but also, of the existence, support, change and disappearance) in the discursive data redistribution”. In other words, the discursive formation may be called a set of knowledge, verbalized in a regular way and necessary for formation of any particular science. Thus, the discourses are at once means and result of knowledge formation; they differ depending on certain knowledge specificity. Therefore M. Foucault distinguishes such discourses as economic, natural-historical, medical, philosophical, religious, and etc., but with an important reservation: the science (and knowledge itself) within margins of which the discourse is developing must be mature and such one that has happened.

Restricting the activity of people to their linguistic (that is, discursive) practices, the scientist comes to a conclusion that each scientific discipline has its own discourse represented by a “form of knowledge” specific for this science – a conceptual apparatus with thesaurus interrelations. This is what the work *Archeology of Knowledge* (“*L’archéologie du savoir*”) says. Displaying the concept of discourse, M. Foucault treats discourses not only as a set of signs, but as certain practices (discursive, linguistic) that constantly form the objects they are talking about. According to M. Foucault, all the facts of culture fit into the context of “discursive” practices. “Discursive,” according to Foucault, does not mean “rational,” “logical,” or “linguistic” in the direct sense of this word. Discourse is a midpoint between common rules and individual phenomena; it is a sphere of conditions of capability of language and cognition. And thus, discursive practices rather than exclude

other types of social practices, on the contrary, admit them and require coupling between them. This creates the concept of “universality of discourse”.

The discursive practice, according to M. Foucault: “Is a body of anonymous, historical rules, always determined in the time and space that have defined a given period, and for a given social, economic, geographical, or linguistic area, the conditions of operation of the enunciative function⁵”. Such practices are subject to the rules of formation, existence and co-existence, systems of functioning and etc. The main feature of such practices is pre-sign, pre-semiotic level of discursive, linguistic practices, which determine the conditions for the capability of signs, languages, logic and knowledge. On the surface of discourses, according to M. Foucault, the relationships that make them visible are determined. This principle of analysis the thinker calls the “Rule of The External”.

M. Foucault⁶ tries to find such rational forms of analysis that would not appeal to the idea of the subject. He separates the central construction in the form of a “discourse on limit-experience” that helps the subject to transform himself and “a discourse on the transformation of himself through the formation of knowledge”. Understanding the subject as a point of different historically formed discourses crossing, M. Foucault separates the *language, text, and discourse* as metaphorical designations of an all-pervading principle that helps him correlate and optimize these sociocultural phenomena. Thus, according to M. Foucault, first the experience of borders crossing within the practices of language is analyzed, and then the work of thought over itself in a space of possible “limit-experience” is actualized. It refers to a certain transgression as an experience of crossing borders, as a “Gesture Facing The Border”. To be more precise, crossing the border, beyond which the basic values and sense of the traditional cultural world lose their meaning.

This idea acquires a particular importance exactly nowadays, since the discourse of modern mass media has no boundaries in space at all, and hence a completely different meaning of the concept of “information space” arise, which will be discussed a bit later in our study. According to the opinion of French culturologist, modern culture may be expressed in a different language, not related to tradition at all. Such a transformation of language leads to change of style and profound shifts in the way of thinking, immersing the thinking experience into a language that “says what cannot be said.”

⁵ Режим доступа: <https://alhasanainnetwork.wordpress.com/tag/the-enunciative-function/>

⁶ Режим доступа: https://uk.wikipedia.org/wiki/Мішель_Фуко

In this way, Foucault connects the discourse with socio-cultural factors. He carries out this immerse into a specific conditions of place and time by means of “discursive practice” concept.

It should be noted that the famous German philosopher, sociologist, representative of a new generation of “Frankfurt School” J. Habermas repeatedly emphasized the fact of correlation or overlapping of philosophical concept of the phenomenon of “discourse” with its ethical and aesthetical load, and we shall add: a modern concept of the discourse acquires a trans-cultural nature and pervasiveness of this phenomenon in all spheres of being and existence. That is why, philosophers, sociologists, philologists, cultural scientists, art critics, and others work within the limits of contemporary research paradigm of mass media discourse. Thus, the importance of communicative, interdisciplinary, interpersonal and other relations in the contemporary information environment and artistic (on-screen) culture, etc. can be best demonstrated through the example of the analysis of the phenomenon of discourse.

The discourse, by J. Habermas, is constituted by communication. In this context, the social aspect of discourse is of the greatest interest. The thinker identifies five types of discourse that are realized in communication depending on the situation:

- a theoretical one, which is being organized on the basis of cognitive and instrumental mechanisms;

- a practical one, which is connected with moral and practical aspects and relies on the determination of correctness and norm of action;

- a discourse in the form of aesthetical criticism, which is evaluative by nature and is being constructed on the basis of correlation with value-based standards;

- a discourse in the form of therapeutic criticism, the main characteristic of which is expressiveness and the veracity of expressions;

- a discourse of self-expression and self-explanation, which is determined by the achievement of the intelligibility of what is being expressed and based on the correctness of symbolic structures formation.

In the book *Knowledge & Human Interests* he proposes to divide three kinds of interests, transforming in a later period of creativity, into three worlds of a human. The first world is objective, the other one is social or intersubjective, and the third one is subjective or expressive. The cognitive-instrumental discourse relates to the first world, the moral-practical discourse relates to the second world and ethical-aesthetical discourse relates to the third one.

Offering a social-communicative interpretation of discourse, J. Habermas relates the concept of discourse to the theory of social action – strategic,

normative, dramatic, communicative, as well as the problem of social legitimacy. He especially distinguishes the so-called discursive communication, which is characterized by the thinker as free and consensual one. J. Habermas considers this type of communication to be an ideal communicative model, for what the opponents of this theory of communicative action have repeatedly reproached him. At the same time, he proceeds from the fact that the communicative actions studied by him are completely consistent with real features, various aspects of the actions and interactions of individuals in a true history.

Besides, the fact, that J. Habermas recognizes a discourse as a dialogue, in the course of which a reconciliation of conflicting claims for the significance of something in order to reach agreement takes place, is extremely important for our study: the discourse is involved into a dialogue between “one’s own” and “another’s”, in a word, and into an analysis of an interpretation of the world and attitude to the world at the level of perception of a foreign language. Staying on the subtle border between inter-intentionality and reflexivity, the discursive practices (in the broadest sense) become assistants in the complex searches for the image structure of the works of culture and, in particular, of artistic and on-screen culture.

In opinion of J. Habermas, the basis of the discourse is a category of public sphere: just in it the discourse is exercised. The German thinker has two concepts of understanding the public sphere. For the first one the civil society (“Structural change of the public sphere”) emerges as an intrinsic point of thoughts. Russian politologist A. Zinoviev, analyzing J. Habermas work, points out that a public sphere (Oeffentlichkeit) is such publicity (Oeffentlich), which existed in contrast with the privacy in Ancient Greece (public sphere and private sphere).

Determining the second concept of public sphere in *The Theory of Communicative Action*, the thinker writes about a break from the notion of civil society. Habermas notes that the public sphere is localized in the sphere of lifeworld (Lebenswelt). The later emerges as an addition to the communicative action as a sphere of understanding. The lifeworld is integrating socially via everyday communications and coordination of actions on the basis of understanding. It is divided into two spheres: at first – communications aimed at private interests, and secondly – communications aimed at common interests, it means the public sphere. Thus, public sphere is considered to be a sphere of communicative action aimed at common interests. It is a set of ordinary non-private communications, opposing in modern life, for example, political and economic systems, which are integrated by means of power and money. Thus, this concept points to a certain danger for the public sphere in terms of commercialization of its structures.

It should be noted that functioning of modern mass media (mass media) in the public sphere makes the situation even more complicated. The dominant totality of discursive formations has found an ideal mechanism for its existence in the media. More often a large proportion of the population is no longer able to form their own personal opinion, which means that they are overwhelmed by the consensus of those involved in discourses.

There is an uncertainty in interpretation of discourse in modern humanitaristics. M. Stubbs⁷ distinguishes three main features of discourse: 1) in the formal sense, it is a unit of language that exceeds a volume of a sentence; 2) in regard to the content, the discourse is connected with use of language in a social context; 3) the discourse is interactive by its organization, it means it is dialogical by nature. (“It refers to attempts to study the organization of language above the sentence or above the clause, and therefore to study larger linguistic units, such as conversational exchanges or written texts. It follows that discourse analysis is also concerned with language use in social contexts, and in particular with interaction or dialogue between speakers”).

The next well-known researchers of the concept of discourse were L. Althusser, J. Derrida and J. Lacan. This French school characterizes philosophy and historicity of the discourse, its analytical aspect. Here, discourse is explored as a report, speech, words. A certain type of discourse includes its style, linguistic flow, certain sensual aspects represented by a particular kind of art.

Thus, the discourse category has many scientific interpretations; because it is a phenomenon of intermediate character between speech and communication, as well as linguistic behavior – on one hand, and on the other – it is fixed by the text. It should be noted that in the study of discourse at the end of the twentieth century a communicative approach is finally established, it is based not only on the creation of a new categorical apparatus, but also on the rethinking of existing terms: the speaker’s native language flux is formed as a polycytate phenomenon, which includes many ready-made “communicative fragments”, as well as the result of the linear construction of language system units.

We have already noted that the discourse admits a plurality of dimensions. The semiotic understanding of the term “discourse” provides other (it can be called structural) classification of types of discourse. In their Explanatory Dictionary Of The Theory Of Language Algirdas J. Greimas and J. Courtés interpret the discourse, from the one hand, as a “semiotic process”, which, in turn, should be understood as “all the variety of ways of

⁷ Режим доступа: <http://eprints.zu.edu.ua/7168/1/12gnogpd.pdf>

discursive practice, including linguistic practice (types of verbal behavior) and the practice of the non-linguistic (meaningful behavior manifested in accessible for sensory perception forms – gestures, etc.)”. However, taking into account “linguistic practice only”, the scientists consider the discourse as an object of scientific discipline Linguistics of Discourse, or Discourse Linguistics (linguistique discursive), noting that in this sense discourse will be synonymous with the text: “In fact, in some European languages, which did not have a term equivalent to the Franco-English “discourse”, they were forced to replace it by the term “text” and, accordingly, to speak about linguistics of text (linguistique textuelle). Besides, by means of extrapolation as a useful hypothesis, the terms “discourse” and “text” have also been used to refer to non-linguistic semiotic processes (ritual, motion picture, comic book are considered in this case as discourses or texts)”. In the third sense, which is not contrary to the previous ones, the discourse is identified by the authors with the statement-result (énoncé). With respect to the latter, A. Greimas and J. Courtés introduce the concept of “discourse-statement”: “The way in which the statement is understood more or less implicitly (as that which is spoken) defines two theoretical approaches and two different types of analysis”.

The second perspective of the discourse typology is conditioned by narrativity (narration, descriptiveness) – a feature that characterizes a certain class of discourse, “on the basis of which the narrative types of discourse (narrative discourses) are distinguished from the types of non-narrative discourse”. At this, a narrative discourse is embodied in the form of a story, and non-narrative discourse is realized in the form of a dialogue, but these two forms are almost never found in their pure form. It can be said that in any case a language always performs its main communicative function; it means that it primarily serves for information exchange between the people.

The mentioned contemporary culturologist and linguist V. Karasik⁸ offers to distinguish the approaches to discourse in a rather detailed way. We mean the following approaches:

- a pragmalinguistic one, which represents an interactive activity of communication participants, contact establishing and maintaining, emotions and information exchange, influentiality on each other, intertwining of instantaneous, variable communication strategies and their verbal and non-verbal embodiments in the practice of communication;
- a psycholinguistic measurement of discourse, as turning out of conversions from internal code to external verbalization in the processes of language generation and interpretation;

⁸ Режим доступа: https://ru.wikipedia.org/wiki/Карасик,_Владимир_Моисеевич

- a linguo-stylistic discourse, targeted at distinguishing the registers of communication, differentiation between oral and written language in their genre varieties;
- a structural-linguistic discourse, that provides its segmentations and is directed to elucidation of textual peculiarities of communication;
- a linguocultural discourse, meant to establish a specificity of communication within a certain ethnos, to determine formulaic models of etiquette and linguistic behavior, to define the cultural dominants;
- a cognitive-semantic phenomenon of discourse, which is studied in the form of frames, scenarios, mental diagrams, that means different models of communication representation in consciousness;
- a sociolinguistic approach to the discourse study, which involves the analysis of communication participants as representatives of a particular social group and the analysis of the circumstances of communication in a broad socio-cultural context. These approaches are not mutually exclusive.

In the context of our study, a particular interest is paid to an institutional discourse, which represents a communication within specified boundaries of status-role relations. The main participants in the institutional discourse are the representatives of the institution (the agents) and the people who appeal to them (the customers). There exists a principal degree of openness of the discourse between “the customers” and “the agents” in different institutional discourses. The author explained the term “institutional discourse” in such a way: “Institutional discourse is a specialized clichéd form of communication between people who may not know each other but who must communicate according to the norms of this society. Of course, any communication is of multidimensional, script-based nature, and its types distinguish with a certain degree of conventionality. A complete elimination of one’s personality transforms the participants of institutional communication into dummies; at the same time, there is an intuitively sensible boundary for the participants of communication, the way beyond which undermines the foundations of the existence of a certain social institution”.

The property of discourse to organize the means of the language system (language code) in communication under specific psychological and social circumstances in a most general way gives an opportunity to distinguish and characterize already known types of discourses. They are most completely classified by the scientist G. Pocheptsov. He distinguishes television and radio discourses, newspaper, theatrical, cinematic, literary one, a discourse in the field of public relations (PR), advertising discourse, political, religious (fideistic) discourses. Reviewing the discourse in modern culture, let us turn our attention on its literary and theatrical specimens as its verbal and spectacular-phenomenal visualization.

A literary discourse is one of the oldest discourses. Rhythm and rhyme were its common characteristics. An artistic text becomes de-automated: the polysemy of the text for each one sounds similar to the concept of its own content in a particular work. The text gains a personal sense thanks to the reader; the “ciphers” of the text are deciphered every time by another reader or viewer.

The theatrical discourse can also be considered as belonging to a long life in society. Because, except the symbolic and character positions of theatrical discourse, such as scenery, clothing, lighting, it is based on a ritual that begins with the foyer and the wardrobe of the theater and ends with the last replica of the actor at the end of the performance.

The language and the theater arise as two parallel phenomena of sociocultural communication. The examples of their isolated and parallel existence are the examples of cooperation between individuals and groups that go back centuries. The origin of ancient philosophical thought clearly outlines the form of distinction and differentiation. Aristotle in his *Metaphysics* demonstrates to the reader the reproduction of terms with different meanings. In essence, this conceptual dictionary demonstrates that the Greeks developed the world’s rhetoric. This means that we can talk about the beginnings of the intellect existence, about the shape-generating functions of the mind. At the same time, there is a rupture between mental and physical labor. This gave an incentive to the development of a new thinking and a new culture: Word-Speech-Rhetoric.

It is known that the first spectacles in the ancient world were theatrical performances in Ancient Egypt. There appeared the dialogues, monologues, songs and dances which were also the bearers of awareness of the population at that time.

Since such spectacles were the only cultured spectacular event in that time, it is difficult to overestimate their impact on the society of that time.

Greece is a country where participation in festivals and entertainment activities was encouraged at the state level. The rise of masses and the maximum of festive mood sound in the patriotic slogans of the polis. Doing so, the government fulfilled its duty and saved the demos. But let’s not neglect the presence of heretics, different-minded, different-speaking at all times... Such an underground gave rise to its own aspects of discourse as a subject of linguistic exchange of thoughts, which sometimes avoided the acquisition of individual traits.

As a form of culture, the theater and everything associated with it had its logic of development, the core of which remains both language and communication. Its specificity depended on the genre of theatrical performance, and the specificity of communication of the auditorium – on

those strata of society that filled it. But both the first and the second variants determined the advantages of the language environment in this context. First of all, the theater always relied on ancient mythology. That's what defines the control of the linguo-social environment, because myths-stories euphemistically made a secret out of the ancient times. A sign of an illusion or a truth, a reality or a deception – but, anyhow, it is embodied in the cultural message of theatrical gestures, facial expression and articulation. The correlation of something reproduced and heard provides the linguo-informational discourse, disguised as a theatrical action, with the tonalities of a struggle between good and evil, high and low, white and black. A performance, a play is a reality, language of the stage and the hall and of the backstage is, partially, an indeterminate outline, but it is an unconditionally recognized reality. The theatrical space was briskly filled with it.

Particularly an ancient dramatic art is a striking representative of the glorification of religion: the Greek theater was a temple, the altar of which was enveloped in grape clusters, and the performances became religious ceremonies that rather resembled Divine services.

The theatrical spectacle, its verbal content is a certain construction of the festival. It's a win-win schtick of the spectacular genre. And if communication is based on the constituent element of the theater-mystery as one of the initial phenomena of its existence, the focus of the dramaturges on the elements of textual poetics are the typical prerequisites for the origin of the concept of discourse, first of all, in the theatrical environment. The lack of mass media levers at that time (television, press, internet, etc.) only reinforced its role and importance in the society at that time. Sometimes these texts represented an abstract basis, mostly contained truth-loving characters. The people go to the theater not only for the sake of action, but also for the sake of the word. It seeks truth, affirms belief. The word becomes synonymous with art, the subject of a culture of existence and communication.

A linkage to a predominantly calendar show of mysteries has created another interesting detail – the gradual filling of dates (read “holy days”) with its lexicon. The usability of Christmas performances is different in its lexicology from Easter ones; the tradition of ceremonial greetings and special verbal expressions migrates from the society to the stage texts. By means of discourse, the most successful ones become an integral attributes and their shining example. This is the boundary between the following types of theatrical performance: mystery, sacral and secular spectacle. The information carriers – texts, which occupy not the last place in the system of stage accomplishment of the performance, are controlled by the actor or creator. The illustrations, such as verbal “one-man show” are permissible.

Here let's allow us to discuss the indisputability of interpretation, because just the literalism is perhaps the first impulse to bright reflectivity in acting profession as such, and to the internal emotional saturation of the actor's play. The cult of worship, veneration of the theater lies in the utmost respect to the Word. Being restricted by theatrical canons, it becomes decisive and completes the theatrical solution of the play, leaves the framework of the theater itself, disseminates the traditions of art. The Performer – Dialogue – Communication model states that communication here uses language in the form of statements.

Identifying and analyzing the border zones in contemporary cultural studies discourse through the lens of reading, philosophy, linguistics, aesthetics, ethics, and other forms of knowledge, one more important point should be preserved. We mean **mass media discourse** as a socio-cultural phenomenon on the background of the dynamic changes of society, promoting the origin of more recent artistic and musical visions. To the point, the origin (occurrence) of mass communications predominantly firmly lies on the shoulders of the theater. Notwithstanding that our life is a continuous theater, let us start, citing M. Yevreinov, with the Greek definition of the "instrument" of contemplation – "theatron". As a rule, when we look we listen and talk. The journalistic context of the media space has always been in the genre of the theater. Its intelligent layer gave him "air." Notwithstanding that each era defined the attributes of the theater in its own way, life and years themselves defined the frameworks of its status. The genres of theatrical action provide the mass media discourse with a shape. The show, which is organized by the stage director and the actor, can be speechless or take the forms of radio perception by the audience.

Enlightenment is another function of mass media discourse: the desire to convey the information in a form that reflects the moral knowledge of the time. "The sixteenth century is an era of deep contradictions: Erasmus of Rotterdam and Montaigne belong to it, but also a Council of Trent implicates it too, a new astronomy coexists with the heyday of astrology, the renaissance of mathematics is accompanied by the popularity of magic and alchemy. The mentality of this century was as much based on the wisdom of the ancients as it was frivolous in the perception and selection of the wisdom of one's own time. Wild superstitions were neighbors with a refined and skeptical mind, an exceptional erudition – with the same astonishing gullibility and willingness to put fiction and the fruits of fantasy into the category of knowledge. Finally, despite the development of the book-printing, hearing still had an advantage over the eyes in the perception of information".

Ethical tonality of the epoch is an idea of nature serving to mankind, the triumph of good over evil actually made it possible to create the specifics of

the linguistic space of that time and more clearly derive its model. Transformations and scientific masterpieces of discoveries in the fields of astronomy, medicine, botany and chemistry create the “vital force” and the perspective of the vital organism of the language.

2. The forms of the discourse: activity and influentiality

Thinkers of the XVIII–XIX centuries assert the priority of the spirit of a human being (a person). It is the fulcrum that will move the whole world. It should be noted that the great Ukrainians, such as G. Skovoroda⁹, N. Gogol¹⁰, P. Kulish and others reveal the spirit of the Human and his greatness through the lens of their vision of social problems solution by linguistic and information aspect. Notwithstanding that human activity is a threat to the planet, its continuous evolutionary progress sooner or later will transform it into spiritual values. The mysteries of human spirituality remain open. They are concentrated in the conditional expressions of humanity: sound, exclamation, statements, phraseologisms, philosophical thought. The unity of the determinant signs produces a great number of emotions, doubts, informativeness, creates music and painting. The synthesis of arts and verbal music creates a new vision on their essence and mission. The penetration of human language into the future may have an impact on the sequence of life events. In essence, the linguistic thinking forms our character. Having examined a long era of existence of Humanity, we can see the striking differences of each epoch, their phenomenon, the range of vital values, the demand for information stored in a single computer of Humanity – our heads. The internal and such invisible dialogue will surely produce a response. Any discourse in all its aspects (media, readers’, theatrical, and etc.) includes both factual complexity and a high level of abstractions. Discourse is necessary to intertwine the motivations of many people in politics and business, to promote power structures, science, etc. Discourse is expected where you need to convince. The discourse statements for one purpose or another can transform public opinion, outline the things presented positively or negatively and sometimes even create the circumstances for further action of thought. A characteristic feature of the discourse is an attempt to be a bridge of understanding between discussion “camps” and the basis of certain decisions. A mediation of discourse through its persuasiveness and conquest retain it the right to ambiguity. Imagery is perceived by the subconscious. For example, an argumentation in a publicistic discourse is unfolded in a bright, expressive, multifaceted, sometimes unexpected language. It is fraught with intelligence

⁹ Режим доступу https://en.wikipedia.org/wiki/Gregory_Skovoroda

¹⁰ Режим доступу https://uk.wikipedia.org/wiki/Гоголь_Микола_Васильович

and high ethicality. In literary discourse it is in a colorful, organic language, in music – it is filled with the expression of sounds, in theatrical one – almost in a theatrical effectiveness of a sustained play ... The phenomenon of a discourse language is a condition of its existence. Even the first ancient theaters, the ways of communication in them and psychological analysis of personality have built a peculiar model of the language pyramid of this epoch and this environment. The period easily defines the classification of characters, distinguishing the ancient model of temperaments. Clearly this type is manifested in communication – communication of stage speech, dialogues and monologues, theatrical acts and cues. An indicator of this type of communication is the sociological analysis of the linguistic personality. Representation of a person (personality) in a language can be offered through the lens of analysis of participation in a particular discourse. The pragmatism of such phenomena lies in highlighting of the clarity of the subject and the tonal communicativeness that characterizes the subject matter of a particular discourse. The discourse can be understood by the mediation of a text (a newspaper, a book), a conversation (TV interview, TV narration, radio-programs), vision (graphics, painting), aural worldview (music). Actually here we distinguish both the signs of the participants of the communication and the basis of the tonality of this communication. A pronounced analysis of a person from the standpoint of any discourse is a communicative tonality. And notwithstanding that in this case for such division we use the principle of content priority and concretization of the subject, the division of discourse by type of multifaceted conception of discourse, a certain type of reaction to it, the types of communication itself in discourse (for example, joke or grotesque, etc.) are of great importance here. The participants of an action can consume the subject in its direct meaning or identify it with something they are talking about. The changes of this “language” are possible with additional introduction of rhetoric, certain interpretations and ambiguous statements.

Sensitivity is an important feature of each type of discourse. The range of its amplitude fluctuates depending on the brightness of artistic embodiment: in music it depends on the essentials of feelings and world perception, as well as intellectuality of definition of ideas; in painting and graphics the tonality of coloristics and volumes are essential; in conversational discourse the motions of speech tones and placed touches of accents play an important role, etc. The discourse intonations are a residual effect of their existence.

It is clear that non-confrontational discourse is the most acceptable one. The discourse can also be considered as one of the forms of acceptance (perception) of everything that surrounds our society. In this case, its characteristic features will be the study of the subject (theme), the composition of the structure, integrity, comprehension, constancy.

Objectivity (objectification) belongs to any subject; this feature is created and acquired by a human being himself. On the basis of joint activity of a number of analyses a holistic image arises: a system of knowledge about the properties of a particular discourse constitutes a basis for it. Reflection of the theme of its subject and the peculiarities of the subject itself are a source of the discourse integrity. Its peculiarity is a constancy of perception of the conditions of discourse, because mainly in the life the perception of objects constantly changes.

It is interesting to study the language of national music in the postmodern discourse. The concept of pluralism represents here a discussion about the destructive or creative value of the avant-garde related to the category of musical language. The “interpretive” nature of the Ukrainian neo-avant-garde manifests itself in the fact that its national rootedness is not discernible only at the level of mentality, worldview and aesthetic priorities. A one-dimensional, multidimensional presentation of ethno-specific material with an attempt to reproduce its authentic sound as accurately as possible (right up to use of folk instruments and folklore manner of singing) and to reconstruct the definitive structure of the folklore source sonor, that have almost never been “highlighted” in previous types of its processing, became their unifying invariant. This new, higher level of national identity comprehension did not consist in more or less successful subordination of ethno-specific material to the established rules of musical professionalism. The verbal artistic creation of an ancient art in our case can be considered as a prerequisite for the origin of mass media discourse in the modern sense. Humanity created it for itself and for its time. Discourse (read “artistic creation”) helps to activate social processes.

In the basis of any discourse, especially the mass media one, we must first distinguish linguistic communication and the visual backdrop process of cognition. These two concepts, which are united by the definition of discourse and the movement of thinking from one to another, connect one opinion with another; make conclusions on connecting together already known signs. The question, with which namely of the traditional branches of culture and art the culture of linguistic communication should be identified, remains rhetorical. So, let's say, the oratorical art is the closest to politics and jurisprudence, the artistic word is the closest to art, organizational language functions are the closest to ethics. Elementally, language communication has a common methodological and technical organization.

What for are we talking and creating? Actually mass media become a communicative nucleus of conscious creation of modern culturology directions. Such a view makes it possible to observe the centuries-old accumulations of artistic heritage of Ukraine, to come to the analysis of their

structure, to develop theoretical positions of scientific analysis, to make a model of perspective in accordance with professional and cultural tasks. Information communication evolves from the art of persuasion to the art of prudent and critical thinking, from philosophical meditation and polemic to technical propaganda and means of manipulation of public opinion. It has been found in various fields of practical use of oral speech by the society – stage language, artistic reading, art of public speaking and others.

Mass-media language¹¹, which was mostly based on the concepts of rhetoric, is regarded as universal means of human communication. As an incentive discourse it evolves from the art of persuasion to the art of reasoning, taking into account the circumstances of any person's life situations and actions.

Social system liberalization is accompanied by increased attention to the aspirations and desires of the individual. Freedom of speech and awareness provide the ability to exercise that right. Lack of democratic freedoms is tantamount to lack of mass media awareness. The language, which is its only key unit, acquires dominant features here.

F. Nietzsche expressed an idea, according to which two opposite principles – Apollonian (creative) and Dionysian (destructive) are present in the life. Creative and destructive are under the influence of the power of human word. Beneficial and pacifying influence transforms the word into a cultural phenomenon. Influentiality is to earn confidence and a great reputation for the future. A striking TV performance or an article in the newspaper creates the speaker's influentiality, because he persuades the audience in favor of his speech. The emotionality of one speech evokes strong emotion of the other party. Speech (or press publication) itself should have unique value; it should form an intention to do something and change the mood and thoughts of the audience. The subject of mass media discourse in culturology emphasizes one more its aspect – the problem of motivation of performances. It is extremely important for characterization not only the speaker but also the listeners. Giving a lecture, the speaker can be guided by the desire to impress, and listeners may feel curiosity, fear and compassion.

The primary comments here are on the subject matter of the speech, analysis of the audience and situation of speechification. From a scientific point of view, preparation for such a speech is interpreted as a solution of a communicative task, which is to find the linguistic means of reaching the necessary for the speaker response of the audience. The following operations include the preparation of an outline plan, which should consist of separate sentences of the subject-predicate structure. Alphanumeric characters and

¹¹ Режим доступу: https://uk.wikipedia.org/wiki/Засоби_масової_інформації

indentation systems make semantic connections between the sentences. The following is the composition of the speech (introduction, main part and conclusion). The subsequent development of the content of the speech goes through the stages of attention arresting, satisfaction of need, call to action or approval. The “visualization” of the proposed solution is especially effective for TV-mass media: the video screening here is the result of the proposal. And the final stage is displaying by the audience its particular acts – the emotions and beliefs that have arisen in the result of conversation.

CONCLUSIONS

The realization of the purpose and objectives of art permits a resort to media discourse in the extended sense. For language communication, the rhetoric acts as a theoretical basis that distinguishes the contexts of language arts implementation. Mass media get an opportunity to capture a large part of mass audience; they become liberal in the sense of mass accessibility. The methods of mass media implementation become rational. The existence of a computer accustoms to rational organization of communication and highly reasoned considerations. Feelings go away but the evidence is eternal. The demonstrative feature of a visual backdrop brought the methods of persuasion and building trust. Considering the public language communications that make the basis for the mere existence of the concept of media discourse, we face the problem of the conformity or nonconformity of creative individuals (editor, journalist, cameraman, director). These contradictions lead to a comprehension of tendencies, essence and specificity of contemporary journalism – newspaper or electronic, its tasks and functions in the field of human modeling in the world of media and critical art history work. The mass media discourse (rhetoric and the art of language that became its founders) interchanges in its aesthetic and pragmatic functions, because a modern scientific and technological progress raises new issues related to creation of artificial intelligence and control of human consciousness, which receives and stores the information in the process of communication, and general tendency to social life liberalization. This will undoubtedly lead to a new function of mass media in the context of “cultural conversation”.

In the modern globalized world marked by the significant interplay of different information layers – not only vertically (of different historical periods) or horizontally (of different national cultures and traditions), but also diagonally (of different ontological and cognitive levels, for example artistic, political, economic, religious spheres) – any differentiation of texts will always be in a certain sense relative and conditional. Artistic communication borrows the instrumentarium of documentary modus. Everything surrenders to influence efficiency increase. Due to this, the rules of the communicative space can be framed as certain rules of attraction and repulsion.

SUMMARY

1) The mass media discourse is always emotionally colored, since its main purpose is to influence consumers effectively.

2) The mass media at all times were aimed at manipulating the consciousness of the recipients, both in an open and a hidden form.

3) The hallmark of mass media discourse in contemporary culturology is the possibility of a new integrative knowledge, as traits of postmodernism epoch.

4) The integrativeness is an important feature of mass media discourse in contemporary culturology.

5) As all cultural facts fit into the context of certain discursive practices, communicativeness is one of the dominant features of a new integrative knowledge.

6) It is important that dialogueness requires interconnectedness of discursive practices, interconnection between them or exclusion of such practices. The cultural discourse of mass media is involved in a dialogue between “one’s own” and “another’s”, the analysis of worldview and world reception at the level of grasping a foreign language (in the broad sense of its understanding). For this reason, mass media discourse is a “language in a language” that is not possible outside of communicative acts (between subject and object, languages, texts).

7) The communicativeness of modern mass media discourse always exists alongside “live” dialogue. Besides, crossing the boundaries between “one’s own” and “another’s”, the experience of crossing the “experiences-boundaries” (according to M. Foucault), borders in the context of mass media discourse is an act of transgression, going beyond the boundaries of understanding the basic value-based orientations and senses of the traditional cultural life.

8) A modern mass media discourse is increasingly acquiring transcultural features, aiming at the pervasiveness of this phenomenon in all spheres of being and existence. The transcultural tendencies towards discursiveness in mass media knowledge clearly speak about globalization processes taking place in the contemporary cultural space.

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TURN TO POSTMODERNISM IN JOSE ORTEGA Y GASSET'S WORKS AND THE PRESENCE OF POSTMODERNITY FEATURES IN MODERNITY

Olha Smolina

INTRODUCTION

The concepts of “modernism” and “postmodernism” (or “modern” and “postmodern” in usage on post-soviet scientific space and “modernity” and “postmodernity” in English-language literature)¹ today are widely used in a scientific context. At the same time, the scatter of their meanings, understandings, and definitions is very large. There is no consensus among scientists on the chronological framework of periods indicated by these concepts. This fact **actualizes** the continuation of research to identify the specifics of the concepts of modernity and postmodernity, as well as the phenomena that they designate.

In the context of this problem, the judgments and conclusions of the Spanish philosopher José Ortega y Gasset are interesting. The study of his work **is relevant** due to the unresolved circle of cultural and philosophical problems and questions that he posed at the beginning of the twentieth century for the world culture (and above all – European culture) of our time.

The work of Jose Ortega y Gasset as a whole is characterized by trends inherent in the culture of the first half of the twentieth century, which are usually collectively defined as the period of modern, modernism, and avant-garde. At the same time, in a significant part of Ortega’s work, we can notice the trends of the next period, which became significant in the second half of the twentieth – the beginning of the twenty-first century, the tendencies of postmodernity and postmodernism. What is the reason for this phenomenon? Is this the result of creative insights of a gifted person or the implicit presence of postmodernity features in modernity, or maybe this is a consequence of the blurriness and uncertainty of the distinguished stages boundaries in worldview and culture, which are conventionally defined as “modernity” and “postmodernity”? Naturally, it is hardly possible to unambiguously and fully study the problem and answer these questions in the framework of one article.

Therefore, the purpose of this article is to expand the understanding of Jose Ortega y Gasset’s cultural studies, to identify the features of

¹ In this work, the concepts of “modernism” and “modern” are used as synonyms. The same applies to the concepts of “postmodern” and “postmodernism”.

postmodernity thinking and reality that are not directly mentioned, but actually were seen by him in the phenomena and processes of culture of the first half of the twentieth century. Then the consideration of the data in a wider context – in the aspect of the problem of insufficient certainty of the essence and chronological framework of modernity and postmodernity as stages of development of European culture.

The material used for analysis was some Jose Ortega y Gasset's works such as "Reflections on Don Quixote", "Dehumanization of Art", "Poverty and Shine of Translation", "Reflections on the Novel", "Summer Sonata", "Adam in Paradise", works a number of Ukrainian and foreign researchers, as well as publications by Spanish scientists, including modern ones, in translations of this article author.

1. Jose Ortega y Gasset and postmodernity

Jose Ortega y Gasset (1883–1955) – the world-famous Spanish philosopher, publicist, essayist, writer. Because a significant part of his work is devoted to the analysis of contemporary trends in culture and art, he has recently been also considered as a culturologist. The most famous of his concepts remain the philosophical idea of ratiovitalism, the culturological ideas of art dehumanizing, the massization of man, art and society. Ortega's works are a synthesis of philosophy, aesthetics, thoughts about various aspects of culture, about art and literature. Jose Martin Francisco, however, notes that Ortega felt the calling of a writer and publicist before the calling of a philosopher².

A study of Jose Ortega y Gasset's works represents a significant body of publications and has a long tradition (in Spain, it begins immediately after Ortega's death)³. A number of Spanish researchers have already paid attention to the presence in the work of the ideas and statements that are more consistent with postmodern thinking than with the ideas of the first half of the twentieth century. Overall, these facts have not been adequately studied either in cultural studies as well as in other areas of humanitarian knowledge.

So, one of the modern Spanish researchers, Jacinto Sánchez Miñambres, in the context of analyzing Ortega's work "The theme of our time" draws attention to the question of his possible connections with the modern direction, which is called "postmodernism". He suggests considering this short essay as one of the reference texts of the early postmodernism. As evidence of such a judgment Jacinto Sánchez Miñambres proposes a quote from Ortega's cited work "everyone starts with more or less embarrassment,

² Martín Francisco J. (2006) La teoría de la traducción en Ortega. Centro Virtual Cervantes. pp. 1–10. Retrieved from: https://cvc.cervantes.es/literatura/aispi/pdf/06/06_245.pdf (in Spanish).

³ It is noteworthy that for Ukrainian or Russian researches Ortega is more considered as a philosopher, but for Spaniards he is a writer, publicist, and essayist.

to want something unconditionally, and then looks for evidence to show that things are, in fact, the way we wanted”⁴. Indeed, in this Ortega’s thought we can see a rejection of the dominant role of reason, subjectivity, arbitrariness of will in relation to consciousness.

Another Spanish researcher, Jose Luís Abellán García, writes that in the literary association “Generation 14”, to which Ortega y Gasset belonged (and actually he headed it), the features of postmodernism are clearly visible: the rejection of not only philosophical positivism and the legacy of the 19th century, but denial of modernist tendencies. This was manifested in Ortega’s works in the most radical form⁵,

Analyzing reflection on the translation of Ortega y Gasset, Pilar Ordóñez López notes that the work of the thinker “Poverty and Shine of Translation” can be understood only within the limits of intertextuality applicable to the whole work of Ortega. The concept of intertextuality, as it is known, also belongs to the postmodern views.

The Portuguese researcher C. Gomes, in his eloquent title “Ortega y Gasset: on the way to hypermodernism”, identifies several topics in the work of the Spanish writer, which are at the same time precursors of postmodernity trends, namely:

- 1) alignment, destruction of the value hierarchy of times and societies;
- 2) banalization and populism of aesthetic tastes and trends;
- 3) the emergence of individualism / narcissism and its dissatisfaction with society;
- 4) substantiation of the “I” and his dissatisfaction with the political and ideological aspects;
- 5) the growing influence of the media and monopolies, which provoke increase consumer demands of population⁶.

Fernando Candón Ríos draws our attention to the fact that in 1951, Ortega had announced the death of modernity in connection with the end of the concept of methanarratives⁷.

⁴ Sánchez Miñambres J. (1996) Ortega y el nacimiento de la posmodernidad. *El Basilisco (Oviedo)*. no. 21, pp. 62-63. (in Spanish).

⁵ Abellán García J. L. (2005) Ortega y Gasset, adelantado de la postmodernidad. *Meditaciones sobre Ortega y Gasset*. Madrid, p. 597. (in Spanish).

⁶ Gomes C. (2018) Ortega y Gasset: no caminho da hipermodernidade. Uma visão projetiva da Contemporaneidade. *Ideas y Valores*, vol. 67.168, pp. 43–57. (in Spanish).

⁷ Candón Ríos F. La literatura posmoderna española: entre el fin de la dictadura y el auge de los mass media. *Verba hispanica XXIII*, p. 187. (in Spanish).

The author writes: “Curiosamente, aproximadamente veinte años después en clara sintonía con este pensamiento, Umberto Eco y John Barth teorizarían sobre la posmodernidad utilizando estos términos. Fuentes continúa su artículo haciendo alusión a un hito que resultó ser un punto de inflexión en lo que se refiere al reconocimiento del nuevo paradigma posmodernista: En 1951,

Anastasio Ovejero Bernal considers a recognition of the crisis of positivist science (social science and natural sciences) and traditional positivistic psychology as one of the main contributions of Ortega to the development of Spanish humanities. Recognizing that Nietzsche, Husserl and Heidegger had a great influence on Ortega's worldview, Anastasio Ovejero Bernal believes that it would be an exaggeration to consider Ortega as a philosopher of postmodernism, but "I have no doubt that he can be called a philosopher of pre-postmodernism"⁸. In addition, the researcher writes: "When in December 1992 I presented a report on the "perspectivizm" of Ortega in Lisbon, insisting on the existence of some similarities with postmodernity thinking, Professor F. Jimenez Burillo answered me energetically, emphasizing the impossibility of calling the a person a philosopher of postmodernity who, like Ortega, was a metaphysician whose main longing was the search for truth. <...> But Ortega, in his search for truth, was influenced first by Nietzsche and Heidegger, followed the path that I dare to name in quotation marks "postmodern"⁹.

Among domestic researchers, one can also see certain remarks of Jose Ortega y Gasset observations and intentions about the postmodernity. In particular, Alexander Pronkevich notes that in his work "Reflections on Quixote" Ortega denies the model of "romantic Don Quixote", which was dominant throughout the 19th century, and replaces it with a "perspective" approach, which serves as the basis for a postmodern interpretation an immortal novel¹⁰. Also Mariya Moklitsa concludes that Ortega y Gasset considers a real vision only a vision of the world through the prism of the concept¹¹. Tatiana Lisokolenko focuses on the concept of "game" as important for Ortega's work¹².

cuando se empieza a reconocer al nuevo movimiento, Ortega y Gasset, uno de los precursores españoles, anuncia en su célebre coloquio de Darmstadt "la muerte de la modernidad " debido al fin de la idea de los metarrelatos".

⁸ Ovejero Bernal A. (2000) Ortega y Gasset un pensador pre-postmoderno altamente fértil para la psicología postpositivista del siglo XXI. *Revista de historia de psicología*. vol. 21, no 2-3, p. 43. (in Spanish).

⁹ Ibid.

¹⁰ Pronkevych O. V. (2006) "Rozdumy nad Kikhotom" Kh. Ortehy-i-Hasseta: ispanska natsionalna identychnist yak kontaktna zona. ["Reflections on Quixote" by J. Ortega y Gasset: Spanish National Identity as a Contact Zone] *Naukovi pratsi MDHU im. Petra Mohyly*, vol. 59, no. 46, pp. 42–47. (in Ukrainian).

¹¹ Moklytsia M. (2016) Poniattia "zhanr" i "styl" yak fenomen humanitarnykh nauk ("Rozdumy pro Dona Kikhota" Kh. Ortegy-i-Hasseta) [The notion of "genre" and "style" as a phenomenon of the humanities ("Reflections on Don Quixote" by J. Ortega y Gasset)] *Literaturnyi protses: metodolohiia, imena, tendentsii. Filolohichni nauky*. no. 8, p. 21. (in Ukrainian).

¹² Lisokolenko T.V. (2015) Igra kak fenomen kul'tury v opisaniyakh Y. Kheyzingi i Kh. Ortegi-i-Gasseta [The game as a cultural phenomenon in the descriptions of J. Hazinga and J. Ortega y Gasset] *Aktualni problemy filosofii ta sotsiologii*. pp. 88–90. (in Russian).

Russian researcher Lyudmila Gorbunova calls Ortega “one of the most perspicacious thinkers of the twentieth century”, a number of whose ideas have remained underestimated in life and are now gaining relevance. Referring to a number of his works, Lyudmila Gorbunova highlights the following features of postmodernity thinking: a sense of the superiority of our time over any other eras, a lack of faith in patterns and ideals, an increase in life’s demands, unbridled expansion outside of one’s own nature, and innate ingratitude¹³.

Familiarity with the work of Jose Ortega y Gasset allows as complementing the above series of signs and characteristics that he identified in his contemporary culture, but which do not quite fit into the traditions of the first half of the twentieth century.

So, in the work “Reflections on Don Quixote”, Ortega writes: “It is easy to make sure that what is really real for us is not what is actually happening, but some kind of routine of events that is familiar to us. In this foggy sense, it’s real not so much what is seen as what is foreseen, not so much what we see, but what we know.”¹⁴ Here the thinker talks about subjectivity in the perception of reality.

The widely known Ortega’s work “The Dehumanization of Art,” has a particular interest from the perspective of this study subject. That work is dedicated not only to the visual arts, but also to literary creation. According to the thinker, the new style of art seeks to: de-humanize art (it is known that the concept of dehumanization, by the definition of Ortega, means deprivation of the art of human presence – sensual, figurative, emotional, intellectual components). To consider art only as a game and nothing more, to be deeply ironic, to perceive art as something frivolous, not affecting human being. The features noticed by Ortega are common with the postmodern thesis of “the death of the author” and the following “death of a person”.

An analysis of contemporary art provides Ortega with the opportunity to identify means of dehumanization, among which he names the following:

- metaphor (constitutes a radical way of dehumanizing);
- a change in ordinary perspective;
- infrarealism (violation of the existing hierarchy of values);
- dives below the level indicated by a natural perspective.

In his work “Poverty and Shine of Translation” Ortega, tells, on the one hand, the barriers for the most adequate translation of the original text essence

¹³ Gorbunova L.I. (2011) Postmodern kak tendentsiya razvitiya kul'tury XX veka [Postmodernism as a trend in the development of culture of the twentieth century.] *Vestnik MGTU*, vol. 14, no. 2, pp. 265–271. (in Russian).

¹⁴ Ortega-i-Hasset Kh. (2012) Rozdumy pro Dona Kikhota [Reflections on Don Quixote] / per. z isp. H. Verby. Kyiv: Dukh i Litera, p. 127. (in Ukrainian).

into the target language. On the other hand, he empathizes on the possibilities and advantages of the translation as such for literary and public life and the formation of a worldview. Ortega notes: “So, I see a form of translation that would be ugly, science is always ugly, would not pretend to literary excellence, which would not be easy to read, but that would be extremely clear, even if that I clearness took many notes at the bottom of the page”¹⁵. In the above discussion, the image of translation as a hypertext clearly arises, each incomprehensible place, original construction, neologism or reality of which entails a transition to other places in the text or to other texts associated with the previous one.

Another interesting observation concerns the author’s position of Ortega in the essay “Reflections on the novel”. The author, writes Ortega, referring to the example of impressionist artists, should leave on the canvas only the most necessary for the reader to independently finalize the material. “We are as if observing things in their eternal status nascens (that is, at the time of birth – O.S.)”¹⁶. In this case, we can see the unity of the principle that Ortega proclaims, with a postmodern perception of the world and things in it, which was called “from being to becoming”.

For Ortega, science is identical to the language: “For science, things are not significant, but a sign system that can replace them”¹⁷. Here, the author envisages the principle of post-non-classical science, which has no longer characteristics (in contrast to its classical stage) such as: naive realism with respect to cognition of the world in its absolute reality and knowledge the truth through contemplation and sensory organs.

Ortega contrasts art (and also literature) with science:

- science goes from things to a sign system, which operates instead of things;
- art goes from the familiar sign to the thing itself.

The art of “good drawing” allows us to see what is elusive for everyday contemplation, as well as rational scientific knowledge. Here Ortega is also ahead of time, revealing the need for mutual complementarity of humanitarian and natural science knowledge.

In addition, in the same work, turning the reader’s attention to various aspects of his contemporary novel – to worldview, consciousness, social life

¹⁵ Orteha-i-Hasset Kh. (2009) Ubohyst i blysk perekladu. [Poverty and brilliance of translation] *Vsesvit*. no. 11-12. Retrieved from: <http://www.vsesvit-journal.com/old/content/view/659/41/> (in Ukrainian).

¹⁶ Orteha-i-Haset Kh. (1994) *Dumky pro roman* [Thoughts on a Novel] / per. V. Sakhna. *Vybrani tvory* [Selected Works.] Kyiv: Osnovy, pp. 273–305. Retrieved from: <https://www.ukrlib.com.ua/world/printit.php?tid=3815>. (in Ukrainian).

¹⁷ *Ibid.*

and culture as a whole, Ortega changes not only the perspective of the problem, but he himself appears, so to speak, in different guises. As an author (writer, novelist), he discusses the upcoming topics of the novel and its impact on readers. As a critic (objective observer), he gives advice to the author, substantiates the features of the genre and “polishes” it. Finally, as a reader, he writes about the feelings that the reader experiences when immersed in the world of the novel, about their, readers, preferences and wishes. It can be noted that such a kaleidoscopic position of the artistic work author is inherent to a greater extent in postmodern literature.

In “Summer Sonata” Ortega describes fake as a line of decadence¹⁸, but the same characteristic can be attributed to the art of postmodernism. He also points to the recombination of the old as a way of creating the new (which is also inherent in the culture of the late twentieth century): “this joy is to give words a new sound, combining them in a new way”¹⁹. According to Ortega, this joy and a kind of combination art are provided not only by rich life experience, but also by the property of “not being very attached to the homeland”²⁰. This property noted by Ortega can be called cosmopolitanism or postmodernity (somewhat paraphrasing J. Derrida) “anti-topo-ethno-phono-centrism”.

Ortega’s small work “Adam in Paradise” provides enough evidence to attribute its author to the predecessors of postmodernity. For example, Ortega expresses distrust of reason and speaks about impossibility of objective judgment: “No opinion is possible without bias”²¹. He characterizes culture as an accumulation of prejudices: “Logic, ethics and aesthetics are three such prejudices, thanks to which a person rises above the natural world and, relying on them like piles, intelligently and freely erects a cultural building <...> without this traditional accumulation of prejudice, there is no culture”²². He speaks of pluralism of points of view on reality and, accordingly, the absence of reality as such: “There is no single and unchanging reality by which works of art can be verified; there are as many realities as points of view”²³. Ortega characterizes the causal relationship of the phenomena in controverse way to the classical understanding: “vision appeared for the first time not thanks to the optic nerves and retinal rods; on the contrary, the need for vision, the very act of vision, created an instrument for itself”²⁴. In addition, the author

¹⁸ Ortega-i-Gaccet Kh. (1991) *Estetika. Filosofiya kul'tury*. [Aesthetics. Philosophy of Culture] Moscow: Iskusstvo, p. 52. (in Russian).

¹⁹ *Ibid.*

²⁰ *Ibid.*, p. 57.

²¹ *Ibid.*, p. 60.

²² *Ibid.*

²³ *Ibid.*, p. 62

²⁴ *Ibid.*, p. 66.

actively uses the concepts of trick, virtuality, imaginary: “art is essentially a trick; it must create a certain virtual world. The infinity of relationships is unattainable; art seeks and creates a kind of imaginary aggregate – like infinity”²⁵.

After analyzing the above opinions of foreign and Ukrainian scientists, we can state the following:

1) a significant group of researchers of Jose Ortega y Gasset’s work see enough reason to attribute it, if not to philosophers of postmodernity, then to the predecessors of this trend, the so-called “pre-postmodernism”;

2) the mentioned above foreign and Ukrainian researchers see in Jose Ortega y Gasset’s works a rather wide range of features inherent in postmodern thinking, namely: rejection of the dominant role of reason, subjectivity, arbitrariness of will in relation to consciousness; intertextuality; the destruction of the value hierarchy, the populism of aesthetic tastes, narcissism, the increasing influence of the media and their modeling of consumer demands of the population; the proclamation of the end of the era of metanarratives, unbridled expansion outside the personal nature of man-mass.

3) this list of postmodern features in Jose Ortega y Gasset’s works can be supplemented by a number of characteristics identified by the author of this article, namely:

- dehumanization as “the death of the author” leading to the “death of a person”;
- hypertectuality, perception of reality as an eternal process of formation, and not of being itself;
- kaleidoscopic position of the author of an artistic work;
- pluralism of realities and the absence of reality as such (in fact, understanding reality as a simulacrum);
- tricks, virtuality, imaginary in culture and art;
- “anti-topo-ethno-phono-centrism”.

2. Modernity and postmodernity, modernism and postmodernism: approaches to the definition of essence, chronology, correlation

Speaking about the belonging of Jose Ortega y Gasset’s work to modernity and its prediction of postmodernity, it is necessary, as far as possible, to clarify the meaning that is embedded in these designations of cultural periods. There is no unity among scientists on this issue. Most of the available points of view can be grouped into the following main positions:

1. “Modern” and “postmodern” are scientific and philosophical directions, and modernism and postmodernism are directions of culture and

²⁵ Ibid, p. 72.

art. So, A. Ya. Flier writes: “Postmodern, as a scientific and philosophical direction, should not be confused with postmodernism, as a direction of literature and art, using some ideas of scientific postmodern and ironically rethinking the classics (novels by U. Eko, M. Pavich, V. Pelevin, music by J. Cage, films of P. Greenaway)”²⁶. This point of view is close to that established in English-language literature, where “modernism” and “postmodernism” are the designations of directions in literature and art, and the concepts of “modernity” and “postmodernity” are used to highlight periods in the culture of the twentieth century.

2. Modern and postmodern are stylistic directions in art, and modernism and postmodernism are forms of worldview that oppose themselves to the traditional worldview²⁷.

3. Modern and postmodern are the names of cultural eras. But modernism and postmodernism, respectively, are “advanced units” or the dominant directions of development in these eras²⁸.

4. The pairs “modern” and “modernism” and, accordingly, “postmodernism” and “postmodernism” are interchangeable, synonymous concepts²⁹.

²⁶ Flier A.Ya. (2000). Kul'turologiya dlya kul'turologov. [Cultural Studies for Culturologists] Moscow: Akademicheskij Proekt. P. 170. (in Russian).

²⁷ In the work of A. Panishchev we read: “Modern is a style direction in art, which originated in the search for new forms and eclecticism. This trend is characterized by symbolism, the desire to combine several artistic styles in one form; the rejection of the former laws of academism and the search for new patterns in art; the desire to express, find other forms of art that most vividly express individuality; as well as using new technologies. Of course, modern (Art Nouveau – O.S.) was not the only leading direction in the art of the twentieth century, but still it played a significant role in the development of a number of arts. Modern (Art Nouveau – O.S.) was especially pronounced in architecture, graphics, decor, poetry and music.

Modernism is a form of worldview that contrasts itself with a traditional worldview. Within the framework of modernism, a number of directions in art have developed: avant-garde, Fauvism, Suprematism, constructivism, primitivism, cubism, futurism, abstractionism, surrealism, dadism, neoplasticism. These trends in art took shape under the significant influence of the recently developed psychology of the Freudian idea of the unconscious”. Panishchev A.L. (2009) Kul'turologiya [Cultural studies]. Moscow: Soyuz, p. 315-316. (in Russian).

²⁸ V.A. Kutyrev writes: “Terminologically, the difference between the actually existing content of social life and the direction of change is fixed by the so-called “ism”. We distinguish the society and era of modernity and – modern-ism. Society and era of postmodern and – postmodern-ism. <...> Modernism is an advanced detachment of the modern era. Postmodern is an era, a society as a whole with everything that exists in it. Postmodernism is the dominant direction of development in the postmodern era”. Kutyrev V.A. (2006) Filosofiya postmodernizma [The philosophy of postmodernism], Nizhniy Novgorod: Volgo-Vyatskoy akademii gosudarstvennoy sluzhby, 95 p. (in Russian).

²⁹ I.P. Ilyin uses the concepts of “postmodern” and “postmodernism” as interchangeable: “The inconsistency of modern life is such that it does not fit into any intelligible framework and inevitably gives rise to explanations that are no less phantasmagoric than she herself, concept. Perhaps the most influential of these chimera concepts is postmodernism. Have born at first as a

The question of the chronological framework of modernism and postmodernism? Modernity and postmodernity also does not have an unambiguous solution today.

According to Jürgen Habermas, the word “modern” was used at the end of the 5th century to distinguish between the Christian present and the pagan Roman past. In the perception of historical time as “new” for a long time, the decisive factor was the distance in relation to not the Middle Ages, but to antiquity. The concept of “modernity” or “belonging to the present” expressed only the consciousness of an era that correlates with antiquity. And only with the emergence of the enlightenment idea of endless progress, does the idea of “modernity” break with antiquity and only the opposition of tradition remains³⁰. Therefore, Yu. Habermas actually claims that Art Nouveau is periodically inherent in any historical time and stage of development of culture.

The scatter of opinions of modernism and modernity emergence suggests the mobility of the chronological framework of the period.

Modernism at the turn of the nineteenth and twentieth centuries is so profoundly different from the modernism of the seventeenth and eighteenth centuries, which, of course, implies the existence of any reason for the usage of one name for such different phenomena. However, if we understand modernism as a worldview focused on the denial of traditional foundations, then its chronological framework will not be of fundamental importance. To solve this problem Beardsley proposes to consider the concept of “modernism” in two senses: in the broad sense, this is the modern age, including the time of Galileo, Descartes, Newton, as well as rationalism and scientism. In a narrow sense, modernism is a period of artistic and cultural activity at the beginning of the twentieth century³¹.

In accordance with one of the modern points of view (Nikolay Khrenov), “modernism” or “modern design” means the period from the Renaissance to the second half of the twentieth century, characterized by increasing influence and dominance of Western European man’s worldview, his “Faustian” type,

phenomenon of art and realizing itself at first as a literary movement, postmodernism was then identified with one of the stylistic trends in architecture of the second half of the century, and already at the turn of the 70s and 80s it was perceived as the most appropriate expression of the intellectual and emotional perceptions of the era.” Il’in I.P. (1998) Postmodernizm ot istokov do kontsa stoletiya: evolyutsiya nauchnogo mifa. [Postmodernism from its beginnings to the end of the century: the evolution of scientific myth]. Moscow: Intrada. 250 p. Retrieved from: http://www.gumer.info/bogoslov_Buks/Philos/Ilin_Mod/index.php (in Russian).

³⁰ Habermas Yu. (2003) *Filosofskiy diskurs o moderne*. [Philosophical Discourse on Art Nouveau] Per. s nem. Moscow: Ves’ Mir, 416 p. (in Russian).

³¹ Beardslee W.A. (1989) *Christ in the Post modern Age: Reflections Inspired by Jean Francois Lyotard. Varieties of Postmodern theology*. Albany. p. 63-64.

such as Protestant, entrepreneurial. In addition, the emergence of postmodernism, respectively, is associated with fatigue from the dominance of this type, which begins to manifest itself in the romanticism of the nineteenth century³². Therefore, according to Nikolay Khrenov, postmodernity already had begun in the second half of the nineteenth century.

As for the artistic style itself, which is commonly called “modern”, it is believed that it was established in the 80-90s. of the nineteenth century (Dmitry Sarabyanov). A similar understanding of “modern” is given to us by art history, however, for a philosophical analysis of modernism as an intellectual trend, it cannot be considered the main one, since the specifics of the worldview of modernism cannot be revealed within the framework of art history alone.

Most scholars believe that the transition from modernity to postmodernity occurred precisely in the mid-50s.

However, Natalia Avtonomova, considering the mechanism of changing artistic styles, comes to the conclusion that postmodernism is not a chronologically designated stage or trend in the culture of the second half of the twentieth century, but a peculiar reaction to certain principles of artistic trends or styles. That is, each cultural-historical era has its own post-modern reaction. The philosopher sees the positive significance of postmodernism in “restraining hasty, illusory synthesis”, in “honing sensitivity to life and cultural diversity”, in “developing the possibility of existence in oneself without any predefined guarantees”³³. That is, the position of Natalia Avtonomova on the chronology of postmodernity is generally similar to the above position of Jürgen Habermas regarding the time of the beginning of the modern era.

Valentin Ratnikov’s point of view is characterized by clarity in the question of the difference between modernity and postmodernity as the worldview positions. In his opinion the following features are inherent to modernity: faith in the power of the human mind, the development of objective science and objective knowledge, an attempt to free philosophy, science and culture from irrationality, adopting of the idea of progress to the various fields of public life, the desire to develop universal norms of morality and law, and also the general criteria of aesthetic, etc. However, postmodernism is a direction that criticized these representations, and the author relates its beginning to the second half of the nineteenth century³⁴.

³² Khrenov N.A. (2006). *Volya k sakral'nomu* [The will to the sacred]. St. Petersburg, Aleteyya. 571 p. (in Russian).

³³ Avtonomova N.S. (1993) *Vozvrashchayas' k azam: Postmodernizm i kul'tura* [Returning to the basics: Postmodernism and culture]. *Voprosy filosofii*, no 3, pp. 17–22. (in Russian).

³⁴ Ratnikov V.P. (2002). Postmodernizm: istoki, stanovlenie. [Postmodernism: Origins, Formation] *Filosofiya i obshchestvo*. no. 4, pp. 120-121. (in Russian).

We can see that the above opinions have common ground in the following aspects:

- “modern” and “postmodern” as a negation of their previous types of culture and they probably do not localized in the framework of the twentieth century, but had taken place earlier and, in general, can be periodically repeated in the history of human culture development;

- modernity (if we consider that period of history of European culture from the Renaissance to the middle of the twentieth century) is heterogeneous in its characteristics.

In addition, the question arises of relating the phenomenon of avant-garde of the early twentieth century with the cultural periods under consideration. Traditionally, avant-garde is considered to belong to the “modernity”. Nevertheless, there are series of discrepancies between the worldview of the era and the ideology of most representative artistic trends of avant-garde:

- modernity insisted on the existence of the universe objective laws and the need for their knowledge, but the expressionism told about the subjectivism in perceiving the world as suffering and writhing in convulsions;

- modernity seek to expel all irrationality, but abstractionism and surrealism appealed to it;

- naive realism in perception of reality was inherent in modernity, but cubism insisted on the discrepancy between the visible and the essential;

- modernity proclaimed the cult of reason, but surrealism appealed to the unconscious, etc.

Consequently, avant-garde chronologically attributed to the modern era, contains features inherent in postmodernism. Here again, as in the case of the work of José Ortega y Gasset, we encounter the presence of postmodernity in modernity. Given this, we should recognize that the period in the development of European culture, starting from the last third of the 19th century, is no longer modernity as such, but a transitional stage on the path to postmodernity.

In a certain sense, any period of culture development, located between two other periods, can be considered as transitional in relation to them. However, we cannot say that Antiquity was a transitional stage from the era of ancient civilizations to the Middle Ages. Similarly, the Middle Ages, possessing an independent status on the scale of cultural European time and unique characteristics, cannot be considered as a transitional era from Antiquity to Renaissance. The Renaissance, however, has already been accepted (in accordance with one of the approaches) as a transition from the Middle Ages (premodern, traditional society) to the New Time (modern, industrial society). The basis for giving the Renaissance the status of a transitional era is the emergence and gradual development of all those features that are fully manifested in the New Time.

Maybe the modern era should be considered as a transitional period with respect to Postmodern (on the same grounds and given a number of facts revealed)? Arguments in favor of such a point of view besides the ones mentioned above can be, for example, the works of Nietzsche, Heidegger, Freud, who are usually considered as representatives of modernity and precursors of postmodernity at the same time. The reason for this is the presence in their work of a characteristic of both the first and second periods.

If we try to single out the main difference between modernity (starting with the Renaissance) and postmodernity from all other attempts to update the culture that had taken place earlier (according to the opinions of Jürgen Habermas and Natalia Avtonomova), then probably the process of human autonomy from God should be called such. Never before culture had been so explicitly or latently atheistic. Through the self-affirmation of modernity, the worldview naturally came to hyperpluralism as a manifestation of confusion, leveling not only the value hierarchy, but also the concept of value as such, affirming the infinite possibility of infinite choice, perceiving reality as a shell devoid of depth and meaning.

From this point of view, the presence of postmodern features in the modern culture seems quite understandable.

CONCLUSIONS

Thus, an analysis of a number of Jose Ortega y Gasset's works showed that in his assessment of the contemporary stage of literary and cultural creativity development, the thinker went beyond the worldview and art paradigm of the first half of the twentieth century. A significant group of researchers of his work sees enough reason to attribute him, if not to philosophers of postmodernism, then to the predecessors of this trend. The above mentioned foreign and Ukrainian researchers see in Jose Ortega y Gasset's works a rather wide range of features inherent in postmodern thinking.

This list of postmodern features in Jose Ortega y Gasset's works can be supplemented by a number of characteristics identified by the author of this article, namely: dehumanization as "the death of the author" leading to the "death of a person"; hypertectuality, perception of reality as an eternal process of formation, and not of being itself; kaleidoscopic position of the author of an artistic work; pluralism of realities and the absence of reality as such (in fact, understanding reality as a simulacrum); tricks, virtuality, imaginary in culture and art; "anti-topo-ethno-phono-centrism".

At the same time, it should be noted that the thinker did not write about the culture of the future, but in his studies characterized the culture of his present. That is, the features that are now commonly attributed to the second half of the twentieth century, José Ortega y Gasset recorded already in the beginning – the first half of the same century. In addition, we should take into account the wide

range of scientific judgments regarding the essence and chronological framework of modern and postmodern. As well as the presence of a number of facts that speak of “contact”, “flow”, “complementarity” of these eras (the works of Nietzsche, Heidegger, Freud as belonging to modernity and postmodernity; avant-garde as chronologically belonging to the modern era, but with a postmodern essence). It can be assumed that the reason why the features of postmodernity are inherent in the modern era since the end of the 19th century is the fact that modernity and postmodern have a single basis – the progressive distance of a person from God. In this case, modernity (in all its historical modifications) and postmodernity are the stages of a single secularization process.

On the other hand, perhaps turning back from the distance of time between Jose Ortega y Gasset’s work, and us we see what we want, or what we can see. After all, as the thinker himself noted, we see “not so much what we see, but what we know”.

SUMMARY

The article deals with the problem of the lack of certainty of the essence and chronological framework of the periods of modernity and postmodernity as stages of European culture development. The facts of the presence in the period of modernity different features of postmodernity was revealed and analyzed by Jose Ortega y Gasset in his works. In his assessment of the contemporary stage of the cultural development, the thinker went beyond the worldview paradigm of the first half of the twentieth century. In cultural realities he notes signs of polycentrism, subjectivity, irony, “human death”, games, hypertext, that is, features that are believed to fully manifest themselves later, in the second half of the twentieth century. This fact allows us to consider him as a harbinger of the postmodern era. At the same time, it should be noted that the thinker did not write about the culture of the future, but in his studies characterized the culture of the present to him. That is, the features that are commonly attributed to the second half of the twentieth century, José Ortega y Gasset recorded already in the beginning – the first half of the same century. The cause of this phenomenon is the presence in modernity and postmodernity a single basis – the progressing distance of a human person from God. In this case, modernity (in all its historical modifications) and postmodernity are not different periods of cultural development, but the stages of a single secularization process, the characteristics of which intersect.

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THE DISCOURSE OF “LOCAL” IN MODERN CULTURAL KNOWLEDGE: CONCEPTS AND RESEARCH STRATEGIES

Vytkalov Sergiy

INTRODUCTION

Introduction. To understand the logic of forming a specific cultural map, without which it is impossible to talk about the complete history of national culture, it requires its synthetic reconstruction as a unique integrity based on the analysis of the variety of spatial loci of human being. Therefore, spatial discourse in the context of contemporary cultural studies is defined by the search for a “new locality” as ways of constructing a cultural map of processes and phenomena, which are actively changing and transforming.

The works of leading western researchers, whose subject of attention are such concepts as “cultural area”, “region”, “local cultural practices”, “production of cultural area”, etc. are analyzed. The corresponding research methods of these authors were identified and an attempt was made to impose these techniques on Western Ukrainian cultural reality. The importance of local history study is emphasized both in the life of each state and in cultural studies. The local histories influence the formation of national discourse.

This work is a kind of methodological basis for many scientific works of the author aimed at the study of the regional cultural and artistic area.

1. Features of the cultural area study in the context of globalization factors: methodological aspect of modeling

In the contemporary native and foreign cultural studies, the discursive field of local cultures is more and more actively being formed. Local area (region, city, street), local text, local identification – these theoretical constants activate the research vector toward the place and space definition of cultural phenomena and processes. The culture of place, topos, locus in the context of topological reflection (V. Savchuk) is a reaction to the global, multicultural, postcolonial spatial compression of present. Almost antinomic contrasts of “Global World” – “Big Village”, “Center” – “Periphery”, “Capital” – “Province”, “Native” – “Foreign” mark new models of correlation both within individual culture and openness of intercultural interaction. Globalization challenges encourage the construction of new senses in understanding of cultural features of temporal and spatial certainty and the identification of senses of local self-sufficiency. According to a French philosopher and poststructuralist M. Foucault, “Present can be called the era

of space” [4]. Accordingly, “new locality”, “new spatial logic” (M. Castels), “other spaces” (M. Foucault)¹ of non-classical humanities produce theories of local cultures as models of cultural certainty in uncertain global chaos, total globalization increases the tendency for cultural variability and diversity.

The rejection of meta-narratives as an actual principle of constructing a modern discursive field of humanities influenced the change of perspectives in the study of culture from the standpoint of its topological constants. Such structural components of cultural isolation as locus, topos, region in the plane of discourse (unlike the metanarratives of immersed classical hierarchies of culture) create a model of a new ontology – the ontology of place.

The directions of vectors “from central culture to regional”, “from national to local”, “from global to glocal” are changing to the opposite. Accordingly, the gathering of cultural senses is concentrated in locality.

It is clear that, from the standpoint of the global meta-narrative, many distinctive cultural loci at first glance seem to be a chaotic panorama-collage of local peculiarities, which are sealed and hidden from third-party or otherwise. It is known that each cultural region is unique in view of the natural and climatic, psychophysiological, social and cultural features; that directly affects the features of identity and peculiarities – and this is an upstream principle in understanding of cultural locality. However, from these fundamental definitions, the discourse of cultural loci is only beginning. For example, the peculiarity of the formation of Ukrainian local contexts can be defined as anti-colonial discourse in search of new cultural boundaries. Accordingly, each cultural region within Ukraine has its own historical and cultural dynamics of local discourse creation. Symbols, emblems, monuments, traditions, archetypes, myths, folklore of individual cultural loci are formed in the process of cultural formation, unifying or, on the contrary, stratifying – and this is a constant process.

Consider that historically and politically defined borders of regions do not coincide with cultural loci: cultural boundaries are formed by complex structural differences – natural, racial, linguistic, religious and confessional, etc. Accordingly, frontier (frontal) synergies make cross-sections between regions transparent. In the frontal mobility of cultural cross-borders, there is a need to create a new model of spatial typology, which would refuse to reduce the reduction of parts of the structure into an already predetermined hierarchical model. Modern cultural science produces discursive planes for the application of spatial dimensions of culture – cultural area, mental space, locus, local cultural text, place culture, chrono/topos. In the context of a non-classical methodology, cultural studies of the locus of culture are always interdisciplinary studies, which are based on the following principles:

¹ М. Фуко Режим доступу: https://uk.wikipedia.org/wiki/Мішель_Фуко

– the principle of atomic locality of all structural elements of the cultural locus (the cultural locus is not reduced by general meanings of the whole, the Center);

– the principle of the diversity of forms of spatial human being, in which cultural practices and institutions are regarded as spatial loci for the formation of cultural identities;

– the principle of boundary (the boundary of local cultures is not determined by political and geographical boundaries, but is an ontological and ideological constant).

Therefore, it is necessary to clearly define the conceptual principles of “local” cultural studies, to formulate a categorical and conceptual apparatus for exploration of local cultures, and to direct this methodology to the practical plane of research – from the point of view of local projection to reveal the features of cultural formation of Western Polissya in the aspect of cultural and artistic activity. This approach allows us to formulate unique characteristics of individual spatial locations within national culture and to create a theoretical model for predicting further strategies for the formation of cultural practices of both the individual region and the national cultural space in general. Moreover, modern Ukraine has a stable “transitional” dynamic, which can be defined in the categories of political scientist D. Rustow (Dankwart A. Rustow)² as a “transit society”, that is, a post-period (post-Soviet) society, which actively tries out new social and cultural practices, choosing transformational ways of overcoming the rudiments of old system (economical, political, cultural, artistic, administrative, valuable, etc.), creating a “new consensus”, new stability. Moreover, one of the prominent factors of such stability is the comprehension of the value of national unity in the system of local peculiarities in a multicultural environment. Accordingly, Ukrainian society, as a society of high social and cultural dynamics in spatial discourse, is marked with a frontier characteristic, and culture is defined as a frontier, which is characterized by a “boundary”.

Let us define the conceptual content of the basic concepts of local cultural studies – locus, topos (and the chronotope derived from it), region, cultural area, defining the subject plane of their application and semantic intersections. As it was noted by G. Hegel (who created and substantiated his own topographic model of the vertical – the ascent to the Absolute Spirit) – notions-concepts arise when what they characterize disappears, goes to

² Dankwart A. Rustow. Режим доступу: https://www.google.com/search?xsrf=ACYBGNSbin4l7EMYEDjjSUaHbDp2vRigtA%3A1577999733715&ei=dV0OXviZK-34qwG4gYXgDQ&q=Dankwart+%D0%90.+Rustow&oq=Dankwart+%D0%90.+Rustow&gs_l=psy-ab.3..33i160l2.35052.35052..35542..0.3..0.165.165.0j1.....0....2j1..gws-wiz.....0i71.75LrUr4NcfM&ved=0ahUKEWi4qNWM6-XmAhVt_CoKbhAAdwQ4dUDCAs&uact=5

completion. According to this logic, it is possible to determine cultural area only from the standpoint of a certain design of integrity in the tension of “holding” the local as, on the one hand, the instant-ontological (that Heideggerian “daylight” of being), and on the other – changing and dynamical, constantly changing, flowing (but not in time categories, but spatial boundary/boundaries). The conceptual revision of the concept of “cultural region” should also be based on the latest methodological approaches based on the idea of the spaciousness of cultural phenomena and the dynamics of regional formation in historical aspect and modern perspective.

The cultural region is a territorial formation with its own characteristics and features of development from the standpoint of the classical definition. In the history of cultural thought, the concept of the cultural region was formed on geographical, natural and climatic differences; and the outlook constants of the regional identity carriers – on traditions, myths, religion, language, monumental architecture – all that O. Spengler called “physiognomy of culture”³.

In the context of non-classical humanities, the cultural region can no longer be determined by cartographic, ethnic and landscape parameters. Modern cultural studies actively produce ideas of opposites, discrepancies between the spatial and topological dimensions of culture and their ontological foundations: for example, culture of national diasporas, discrepancies of locus of residence and locus of labor (Ukrainian guest workers), transcultural interactions of extralocal certainty (Internet space), emigration, multicultural art and artistic space – all these phenomena and processes (which can be called “spatial compression”) only confirm the idea of the complex structure of modern regional formation.

Moreover, it is necessary to distinguish geographical area (territory) from cultural (place). In other words, culture not only marks the place but also produces it (H. Lefebvre). It is in sociocultural interaction that cultural locations – loci – are created.

Therefore, local dimensions of the typology of cultures, in which an alternative to national and regional distribution is actualized: the atomic integrity of locality forms the uniqueness of a particular community as a unit-organism (like the model of uniqueness of the “soul” of each O. Spengler culture). Thus in the local discourse there is a “meeting”, the interaction of such permanent cultural characteristics as “picture of the world”,

³ О. Шпенглер про історичної типології світової культури. Режим доступу: https://studme.com.ua/129312224872/kulturologiya/shpengler_istoricheskoy_tipologii_mirovoy_kultury.htm

“worldview”, “mentality” with the dynamics of historical and cultural realities, geopolitical situations, frontal gaps and dialogue. The cultural knowledge in the methodology of locality creates a theoretical plane for exploring one of the possible scenarios for description of culture as a holistic object.

We analyze the content and correlation of topological terminology in the context of the study of regional identity in cultural polymethodology and cultural and historical relevance.

The locality within established boundaries-intersections is a topos (from ancient Greek *τοπος* place) – how can one think of a cultural region without imagining the area it occupies? But in ancient Greek, topos is not only a certain place on Earth (country, locality). This word means universality of location – it is a place on a page of a book and a place in a human body, etc.

For a more precise definition of topological terminology in the context of ancient Greek tradition, let us refer to the texts of M. Heidegger, for whom, as we know, language (most of all ancient Greek language) was a special landscape, in which philosophical meanings were hidden. Thus, M. Heidegger noted that Aristotle for the first time explicitly formulated the meaning of the word “space” and thereby set a cross-cutting tradition for further theoretical destiny of its interpretation. Aristotle’s first definition is this: *τόπος* = place (Ort) (the Greeks did not have their own word for the concept of space at all); the place of the body was determined by the fact that what it limits as a burden. At the same time, for the Greeks, the border is not where something stops, not negative, but what starts something, what forms, sets the borders. The border (*πέρας*) is a positive definition for the Greeks. The other thing that allows something like an extended bodily thing to occupy space is called by the Greeks *χώρα*: a space that can accommodate such a limited thing. Space has the property of accommodation, it gives things its place; space encompasses that one, which is outlined by the boundary of the bodily thing and which is offered by the space itself’.

Utopias are the first variant of speculative reflections-concepts regarding topology-locality. Utopia is a fictional place, a place, which does not exist, a place-myth. In the context of spatial modality, utopia can also be defined as the space of the imaginary, the space of the symbolic, the ideal. The opposite of the concept of utopia is the concept of heterotopia⁴. This explains the true renaissance of utopias in the Renaissance (F. Bacon, T. More, T. Campanella), when for the first time with the discovery of infinity, a person could allow to

⁴ У науковому дискурсі існує ще один варіант топосу – *ізомонія* – об’єднання смислів (або пошук) в одному культурному просторі. В методологічному ракурсі – це формулювання загальних рис культури на різних рівнях його розгортання.

construct social space in the categories of “topographic” rather than in categories of “ideal” (as it was from Plato). Herefrom is the powerful movement of discoveries (or “rediscoveries”) of new lands, the New World. Accordingly, topographic characteristics are actively involved in European rationality as a factor in modeling of local identities (city, district, country, nation, continent, etc.).

Heterotopia (from the ancient “other place”) is the transfer of a cultural locus from the place of its “production” to another cultural space. In the context of our study, the creation of a model of cultural locus as a production of space of general meanings without rooting them in one place-topos. Any culture is heterotopic in its nature. Therefore, this characteristic creates the necessary research aspect to understand the variants of cultural “transfer”, “overflow”, “avoidance”. Non-classical humanities actualized the concept of heterotopias: M. Foucault⁵ developed this principle in his own model of disciplinary loci. French philosopher singled out four models of heterotopia in culture. The first model is the model of crisis and (or) deviant heterotopias – spaces, which place people who do not fit into the parameters of the “normal” place (for example, in traditional communities for women in their reproductive functions); in modern cultures (in the context of cultural Foucault concepts) there are so-called “disciplinary spaces” (recreational homes, prisons, homes for the elderly, clinics, hospitals, etc.) which are localized through the existence of models of certain discursive practices. In the categories of cultural regions, this is any model of closed recreational space, museum, archive (for example, museums of folk life and crafts, in which the modern man “simulates” folk crafts, producing them in a museum environment).

The second model of heterotopy is a model of configuration change of a place depending on change in a sense of culture. Foucault gives an example of the location of cemeteries in the European tradition: cemeteries near the church in central locations of the area are gradually being transferred outside the city, on the outskirts, on the line of delimitation (city/non-city), creating in the present such parallel “settlements”, “twin cities”. In the categories of cultural regions, this model of heterotopia clarifies the principle of synchrony of sacred spaces (from sacralization to oblivion and conversely).

The third model is a combination of several cultural loci-places in one topos. For example, an auditorium in a cinema is a combination of theater art tradition with a three-dimensional, two-dimensional screen-canvas. In the categories of cultural region, for example, it is the main square of any city (for example, Kiev “Independence Square”), which unites different cultural meanings – the center, the place of fateful events, symbol, title, holiday, etc.

⁵ М. Фуко Режим доступу: https://uk.wikipedia.org/wiki/Мішель_Фуко

The fourth model is a model of a sense change of a place due to a severance with traditional time (a kind of “time machine” transferring from one time to another within one locus). In categories of region, these are the loci of the holiday (for example, City Days, fairs, festivals): places which for some time “cut off” the holiday into everyday life. No wonder that any festival movement begins with definition of a good location (castle, square, historical house, etc.).

Therefore, as it was noted earlier, the essence of any culture is determined by its degree of heterotopicity. The romantic metaphor of this cultural characteristic is, according to Foucault’s⁶ suitable definition, a floating ship: a ship (culture – auth.) is a certain locus of concentrated senses that travels, moving across the boundless ocean from one port to another in search of treasure and the unknown. Heterotopia “nourishes” cultures. “Otherwise, in civilizations without ships (see without heterotopia – auth.) dreams fade away, adventures give way to espionage, and corsairs become police”.

In the context of the study of local parameters of national culture of Ukraine (Western Polissya), these models contribute to the analysis of localities of both positive and negative heterotopias. It is the local dimensions of national culture that make it possible to understand the ways, in which cultural meanings are generated by the “place” (not territory) to find the boundaries of tolerance/ intolerance, susceptibility/insusceptibility, openness/closedness within both local culture and national identity. Heterotopia actively forms the artistic and artistic space. The principle of heterotopy allows to present a model of living of traditional art (in the version of folklore) in modern amateur art. Seasonal festive areas of local festivals can also be explained in the heterotopic intersection models – the meeting of the festive and the everyday, creating the event model of a holiday festival.

In the history of cultural thought, two general vectors for defining culture can be identified from the point of view of its local characteristics. The first line is the so-called conceptions of local cultures, which appear as opposed to the Eurocentric paradigm of universal cultural and historical linearity (Baden Neo-Kantian School, O. Spengler, A. Toynbee, A. Kreber). Another vector, the opposite one, in theoretical models of which culture is always a supersystem phenomenon, which combines linguistic, social and organizational, technological, valuable parameters and elements. Accordingly, typological diversity does not appear at the level of individual cultural formations (loci), but in the variant of new combinations, interactions (L. White, K. Levy-Strauss, evolutionists). In this context, we recall the work of a famous French social philosopher A. Lefebvre, with the eloquent name

⁶ Там само

“Space production”, in which the thinker raised the need to designate social space not only as a static marker of place, but as an interactive factor of production: “it’s a product-producer, support of economic and social relations. It is possible that the cultural space is involved in the process of reproduction of the production mechanism, in the creation of branched social connections, which are realized in practice “in the locality”. The space-locus forms societies, institutions, social and cultural practices and also generates artistic forms, which are considered in this dissertation in unity and interaction.

Therefore, local culture (Lat. *lokalis* – local, *locus* – place) is something that belongs to a particular place, creating a separate cultural location. Moreover, the sub-nationality of local culture is not constructed as a relation of “a part to the whole” (the sum of local cultures cannot determine the national cultural whole). Accordingly, the problem of the study of Ukrainian local cultures is in the permanent uncertainty of the state borders, their discrepancy between cultural loci. In the conditions of modern multi-ethnicity of any state formation (and Ukraine in this matter is no exception), unification takes place on fundamentally different parameters: social and cultural identity, political and economic interests. Modern state formation strengthens the discourse of local cultures, directing imperia and centralized intentions into a vertical model of the intersections of individual cultural loci. In general, within one national state the formation of cultural locations is influenced: the state administration creates or cancels certain administrative and territorial units, transfers the capital cities and so on.

In most European countries, the strength and dignity of a national state is not determined by the longevity of its existence – local histories influence the formation of national discourse, not conversely. For example, in France, the influence of regions is growing in proportion to their distance from the capital: almost all modern Bretons believe that “first Brittany and then France”. In this perspective, F. Brodel explored the local features of the French as separate loci-worlds with mental uniqueness, outlook, worldview and life. F. Brodel also incorporates a discourse of gastronomic features and preferences into the structure of cultural uniqueness, in which food is also transformed into a regional marker of identities.

In the same way, more and more actively the locality becomes not only a sign of cultural identity, but also partly a way of survival. Probably, for the contemporary Ukrainian culture, the model of regional identities should be formed as polylocal discourse, the atomicity of which can serve not as an artificial (not “from above”, not from the center determined) model of cultural integrity, but a rod (axial, according to K. Jaspers) with an externally forming system. Moreover, the conceptualisation of local discourse at different levels – mythological, historical, political and ideological, aesthetical and artistic creates (forms) the integrity as a model of cultural area.

2. Local Content of Analysis: The Specificity of Research Strategies

Based on the premise that the local cultural space, as a dynamic and complex phenomenon, is a component of the universal cultural locus and requires in the process of its research the emphasis on all components, which allow it to be studied in its entirety, taking into account various objective and subjective factors, the study pays attention to all directions and approaches, which make it possible to study this phenomenon, combining local lore, historical, cultural, social and cultural, artistic discourses and comparative definition of models of their interaction.

The local text is understood as a cultural concept, in which vertically correlate cultural components around a particular axis – the axis of a particular cultural region. This approach causes the transfer of topographic definitions of culture (culture as a locality, cultural and historical plane) into the realm of ontologically semantic formulations (loci of being). This difference is perfectly “responded” by language: if the phrase “cultural space” is freely converted into a phrase “intercultural space”, “multicultural space”, etc., then the finality of “local” can not be “overlapped” by the “inter-”, “poly-”, but only in a different locality. For this difference you can “check” and the concept of “region”. It should also be considered, that the concept of “region” within modern social and cultural studies is becoming a construct, an object of political and ideological technology (for example, the creation of discourse “South-East” by Russian political technologists in relation to certain regions of Ukraine; “North-South” in the US Civil War, etc.).

In cultural studies, along with the concept “cultural space” (often needlessly synonymous), the concept “cultural landscape” is used. The difference between these two is that the cultural landscape “binds” the culture to geographical spatial configurations (place on the plane), and the cultural space is the extent “vertical/horizontal” of the culture, a constant combination of place and cultural meanings.

It is necessary to clarify in this context the meaning of the concept “cultural locus”. Thus, the “cultural locus” is a bifurcation of the uniqueness of a certain place-point in the dynamics of creating cultural connections and meanings. The synergy of place-point (locus) creates conditions (including spatial) to attract cultural meanings, organizing the polysystem model – the cultural locus.

To better illustrate the mechanism for creating cultural locality (and to more accurately identify the differences between different types of spatial definitions of cultural identity, such as “cultural space” and “cultural landscape”), we include in our research circle the concept of “chora”, by which we can clarify some methodological positions of local discourse in cultural studies.

The notion of “chora” (from ancient Greek Χώρα – country, land, place)⁷ in the ancient Greeks, as it was noted above, was used alongside the term “topos.” Deconstructivists recalled this synonym dyad – topos/chora and implicate in scientific circulation to distinguish the practices of speaking and writing (to call into question the logocentric world regulation as a basis for the New European cultural tradition with all its components). Thus, J. Derrida transforms an underused concept into a general concept of his own methodology. Involving Plato’s “Timaeus” dialogue, the word of the chora is tested by a French philosopher on models of a place, which cannot be determined, established, “grasped”, but which generates and accumulates meanings (models of identification).

Thus, for Socrates in this dialogue of Plato, in order to explain own place-hypostasis in the Athenian polis, it was necessary to choose a certain leveling position “beyond ...”, “over ...”, which Plato called the word “chora.” Derrida developed this idea by presenting it as a model of the repository of “zero” meaning, as a “zero” place, which is capable of “receiving” and accumulating the following future meanings [4; 167]. A sort of apophatic definition of space (“space without space”), but with a subsequent heuristic of local certainty. By the way, the ancient Greeks’ chora had another semantic basis – the so-called separate area in the polis system – suburbs, agricultural abutting lands, which are known to be a part of cities-states. Negative spaciousness is also explored in the semiotic model of Yu. Krysteva, for whom the concept of chorus is a pre-eminent way of expression the meanings (the same unformed design, background text, maternal speech).

Fitting into the polymethodology of non-classical humanities, the concept of “chora” becomes an auxiliary construct to express negative locality, locality without place, locality in the bifurcation number of future systems’ creation (cultural loci).

Thus, a comparative approach in the study of the specific relation of the concept of locus with other models of topographic definition of culture (region, topos, local cultural space, local text, local myth, etc.) allows to trace the formation order of the original features of locality. So the local culture is formed:

- as a model of a particular type of culture – ethnic, traditional;
- as a model of regional determination – geographical, political, economic;
- as a model of dynamics in time – historical;
- as a model of life originality – artistic practices from the standpoint of their formation and institutionalization.

⁷ Вайсман А. Д. Греческо-русский словарь: репринт V изд. 1899 г. Москва : Греко-латинский кабинет Ю. А. Шичалина, 1991. С. 1307.

Accordingly, the concept of a cultural locus may contain a complex of concepts-characteristics of particular cultural spaces – artistic, symbolic, imaginary, communicative, everyday, etc. That is, different areas of cultural life are reproduced in different temporal and spatial forms of its creation. Moreover, the local text is at the same time a text of culture, which is “decorated” with powerful aesthetic and artistic means, artistic practices, artistic policy, artistic education, the activity of individual representatives of both professional and amateur artistic fields. This is the conceptual basis of the research – to identify and analyze the shaping and institutional processes of a particular cultural region in the national space of Ukraine – Western Polissya – in models of the vertical axis, which are “strung together” by unique local meanings, value propositions, modes of representation, memory loci, personal modes of aesthetic and artistic activity. The local context actualizes the problem of the importance of individual experience, which cannot prevent the existence of formal boundaries. Topological discourse enhances the existential dimension of local human identity – the self-identifying marker “who am I?” is identified with the spatial marker “where am I from?”. Biographical and memorial research within local histories is a must have program for any mobile community: belonging to a particular place is not always determined by cultural affiliation; local stories vary and change at different moments in life.

The same happened in the Polissya-Volyn region, when with the transition of lands to the USSR the local discourse changed dramatically, combining imperial-Soviet semantics with local peculiarities. Accordingly, the ways of constructing the meaning also changed and the socio-cultural process of institutionalizing the cultural practices, which we were exploring, was also consistent with this. Technology and processing of social and political change has its own patterns; and artistic culture becomes a necessary tool for influencing these changes. The mental-root layer of culture, of course, changes much more slowly and less radically.

Local myth is a necessary component of the local identities formation. The modern myth is created with the help of historical memory. It is the specificity of cultural memory, together with the techniques of remembering, forgetting and memory places, that transforms history, the narrative about the past into the imaginary story, which, in fact, becomes a myth. It should be considered, that the mythologization of the locus is the final stage of creating a local cultural identity. And not with a mythology begins an identity, but with an exit to the “other.” First, the plane should be shaped, acquire a stable boundary and consolidate the centralization and repeatability. Then stability and firmness of interactions lead to self-awareness of location as a uniqueness, which is usually made possible by the external observer (in the

methodology of “dialogue of cultures” it is a period of enrichment of cultural meanings due to the distance-limit of looking at oneself as at another one). The next stage is the stage of mythologization of unique traits, search and presentation of identity in different forms of cultural practices. For example, a myth of place is a technology of remembering, which is actively used in modern representational forms (including in artistic practice). In this perspective, art also arises as a powerful factor in the representation of identity.

Considering that historical knowledge appears in the nineteenth century (as well as cultural studies), and continues to formulate approaches and principles for the representation of the past, it is necessary to constantly take into account the complexity of such obviousness as “cultural history”, which, on the one hand, arises as a range of cultural studies and, on the other, is saturated with methodologies of historical knowledge. Local history is one of the areas, which equates traditional academic principles of historical science and models of non-classical cognition in the categories of local narrative as discourses of cultural anthropologists, historical geographers, sociologists, demographers, urbanists, etc.

One of the modern models of spatial locality representation and study is the microhistory model, which appeared as a methodological construct in comparing official scientific historical knowledge and models of historical representation as amateurism of local histories and chronicler speakers without the status of historians, who from the positions of meta-narratives were automatically included in the category of “non-speaking majority” (by A. Gurevich). Although A. Gurevich formulated this maxim as a methodological principle of understanding the culture of the European Middle Ages from the point of view of alternative written sources of research positions⁸, the same hierarchy of representation does not disappear even at the time of total fixation of “stories about anything”. For example, one of the monographs of a famous British scientist and historian S. Fowler (Simon Fowler) represents the culture of the “non-speaking majority” as early as the nineteenth century, exploring the lives, everyday life and mentality of workers who lived in the so-called “working houses”. This cultural locality reflects a powerful layer of misery history as an alternative to the cultures of elite palaces, philosophers’ offices and writers, science labs and university departments. And in this type of intelligence there is a need and a necessity, since the principle of “non-speaking” is not in the foreground of the fact of source fixation. In the context of the study of atomic cultural loci only the

⁸ Паралельно таку ж історичну ревізію проробляв М. Фуко в генеалогіях влади знання новоевропейської епістеми

research point-position and scaling change. And such a controversial replacement does not affect the value of the achieved results in any way. On the contrary, micro-narratives form the semantic lacuna of local cultures as a discursive plane of “new locality”. The contrast (rather conflict) of academic history and local lore (local lore, which in most cases, unfortunately, continues to be a research realm of amateur historians) should end in the formulation of local narratives in institutional arrays and scientific legitimization. There are eloquent examples of such completion.

For example, in the English-speaking scientific tradition, the term “local history” is used to represent a particular branch of historical knowledge from the standpoint of particular unrelated localities – the history of a particular city or village, home, building, local cultural industries and organizations, individual residents and families on the background of local traditions, customs, folklore and popular culture. Moreover, communities are initiating and creating powerful research and information platforms, where every interested person can find what he needs to understand and (what is more valuable) create his own local narrative. The Ancestry Library’s online archive search programs are being created and operating, so-called “local offices” are being developed – the collections of local history information, which, unlike traditional local history museums, tells history on behalf of an individual. In other words, the simplicity and intelligibility of the term “local history” actually conceal the complicated vicissitudes of humanitarian knowledge of the present, in search of new approaches to the representation of the historical past beyond the meta-hierarchy of meanings.

Modern urban studies convincingly test the principle of local discourse. The methodological approaches of urban studies make it possible to present urban culture as an extremely important concentrated locality with a wide variety of cultural practices. And the city as a system is a construct, which needs to be modeled from the standpoint of environmental friendliness and harmonization of all its components. The theoretical substantiation of these positions is presented in the works of M. Weber, B. Groys, G. Simmel, M. Castels, L. Mumford, A. Turnen.

For our study, urban locality (in the image of such cultural centers of the region as Lutsk and Rivne) is considered not only from the standpoint of their unique historical and cultural characteristics and peculiarities of the formation of creative and artistic centers and cultural and artistic practices. The study of the cultural potential of urban space in Lutsk and Rivne is an example of the creation of a methodological basis in the dialogue between ethno-localities and the state (or states). As it was demonstrated by the potential of this type of understanding, a modern Finnish anthropologist and sociologist A. Turunen proved in the book “Forgotten History of Cities: How Wealth and Cultural

Development Are Acquired by Tolerance”, that the cultural progress of cities provides one, but overriding characteristic – tolerance. On the example of world cultural centers (such as Miletus, Alexandria, Florence, Amsterdam), he notes that all cultural innovations (economic, cultural and artistic) arise in a condition of tolerant community attitude to various opinions and reveals (even extravagant and arrogant). According to the model of modern urban design of urban spaces – it is, first of all, models for creating spaces for communication and deliberate experimentation with the “other”. To the extent that this approach is fully implemented, the city is capable of forming its own cultural capital. It is not without reason that, together with urban experiments, the festival movement, educational and artistic space and cultural infrastructure are activated. In other words, these institutional shifts and changes in the context of urban science are always consequential factors of multicultural synthesis. This approach is at odds with the usual so-called “container” theory according to which cities are viewed from the standpoint of national states formation.

The “boundary” status of Western Polissya is a starting factor for considering cultural and artistic processes of region in our study. The principle of dialogue between the cities of Rivne and Lutsk in the creation of local identity allows us to create a dynamic model of local spaces, within which transformational processes occur, which is the purpose and object of this work.

This study can serve as an example of the creation of such “local cabinets”: the cultural processes of region under study are reconstructed on the basis of rich factual and personal material, which gathered and analyzed all significant cultural and artistic phenomena as distinctive factors of local cultural formation of Western Polissya. At least such a variety of material is converted to a structured model in a vertical axial projection. Artistic practices (both professional and amateur), art-educational institutions and management strategies, representative forms of local cultural features (exhibition activity, festival movement, photo-, cinema representations, local amateur artistic creativity) – these are the components of the cultural locus collected and explored in such a multilayered combination.

In addition to the “axial” methodology, the principle of meaningful distinction between “culture” and “cultures” is involved. The versatility “culture” in the context of the study of models of local cultural practices dialogues with the multiplicity of cultural forms (art, amateur art, crafts, art education, practice of management structures, press, Internet content, photography, cinema, television, art exhibitions and festival movement).

The ascending principle of the multiplicity of “cultures” as forms of cultural practices is their institutionalization: individual cultural reveals are

seen as social institutions; and their activity creates a distinctive system of culture in region. Hence the logic of meaningful “branching” of various forms of artistic practices is being built: the institutionalization of folk traditions (amateur creativity, decorative and consumer dimensions of popular initiative); Western Polissya art practice as a representative form of identity in the creation of a local cultural and artistic space (musical life, photography, film art, painting, exhibition activity); managerial technologies and educational strategies in the formation of local cultural characteristics of Western Polissya (formation and development of art education in region, experimental models of leisure forms, some aspects of management of organizational and financial and methodological support of artistic practices) and peculiarities of organizing and conducting regional festivals (“Art Jazz Cooperation”, “On the waves of Svityaz’ lake”. Moreover, the regional identity is built up through intra-local characteristics (ethnic, historical, denominational, political, social, cultural, etc.), and in comparative comparisons with other cultural topos in the context of the overall national space of Ukraine. The algorithms of local cultural practices in the aspect of the institutionalization of the artistic space (art education, leisure forms, local festivals, amateurism) create a “local cultural code”.

The UN report on cultural development as an extension of cultural practices provides the following classification of the creative economy: 1) cultural heritage, 2) visual and performing arts, 3) audiovisual branches, 4) Internet and printed media, 5) the latest media; 6) creative services (advertising, design, architecture). All these directions are factors of contemporary cultural formation, and their interaction is a dynamic plane of specific cultural practices. According to this classification, all our publications analyze local cultural and artistic practices as a multidimensional process, which is characterized by the involvement of political, economic, social factors, artistic and educational strategies, activism of the civil sector (individual representatives of the artistic elite of the region) and state-administrative strategies. Without pretending to be exhaustive of this material, we understand that this “encyclopedic” variety of research can serve future research and to the next scientists, specifying in individual subject aspects and methodological approaches. We have deliberately chosen such a unifying (synthetic) model because it is important to present diversity as a synergistic self-movement of local forms and processes in contemporary local cultural formation.

CONCLUSION

So the spatial discourse in the context of contemporary cultural studies is determined by the search for a “new locality” as a way of constructing a

cultural map of processes and phenomena, which are actively changing and transforming. Therefore, the discourse of “local” in culture and local cultural phenomena in the national space become a research unit in the study of the features of contemporary cultural, artistic, educational, managerial or various leisure practices, the dynamic of which creates the appropriate synergy of the polysystemic model.

Attention is drawn to the concepts of spatial discourse in the context of contemporary cultural studies, which are also defined by the search for a “new locality” as a way of constructing a cultural map of processes and phenomena, which are actively changing and transforming.

Understanding this semantic instability within the limits of cultural science, the author analyzes the content and principles of spatial definitions of culture, in particular: locus, topos, chora, heterotopia, cultural space, cultural locus, frontier, etc.

Western Polissya is a specific Western Ukrainian cultural locus, which covers the territory of Rivne and Volyn regions.

The scale of the local cultural features study is also changing: the national is no longer a permanent generalizing and metaphysical combination of localities. Accordingly, the cultural locus in frontal dynamics can change the markers of the general (national) and single (local) markers to the opposite. For example, as Western Polissya is not the sum of the cultures of Rivne and Volyn regions, but is a distinctive locus of national culture, so Rivne and Volyn regions form a national cultural discourse with their local cultural formation.

SUMMARY

The processes of globalization, which until recent times were considered without alternative and dominant regularity of civilization concede, are balanced by the tendency to structure and differentiate the world cultural space today. In such circumstances, individual cultural locations arise in historical structures, which form the basis of human communication in all times of history and consolidate its ontology with the value energy of ideas.

The materials of the section review the specificity of local detection in modern cultural knowledge. The analysis of scientific works of leading western researchers, for whom these issues are of interest, is accomplished. Attention is drawn to a number of concepts, such as “cultural region”, “topos”, “locus”, etc., and their modern interpretation is given. An attempt was made to identify models of heterotopy (from ancient Greek – place). The specificity and the role of region in the Western European context is clarified and the methodology is applied to the Ukrainian context, including Western Polissya. Leading local culture models were identified.

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THE UKRAINIAN KOBZA AND BANDURA IN ORGANOLOGISTS' WORKS OF THE SECOND HALF XX – EARLY XXI CENTURIES

Zinkiv Iryna

INTRODUCTION

Bandurais considered in organology to be the most debatable instrument of the traditional music culture of the Ukrainians. The issues of its origins are being actively discussed in modern scientific discourse. The representatives of traditional Slavic organology, Mykola Lysenko, Aleksandr Famintsyn, and Hnat Khotkevych, made significant contributions to its study, and found that kobza and bandura were two different instruments. These scientists have shown that there were two types of bandura in the Ukrainian traditional instruments: with *prystrunki* (short melodic strings) and without. H. Khotkevych refuted the Famintsyn's hypothesis about the Western European origin of the bandura and the eastern, Asian origin of kobza. He made an assumption about autochthonous origin of the bandura, without confirming it with scientific arguments, which, ultimately, corresponded to the general state of organology development in 1920s in the territory of the USSR.

The author attempts in her article to analyze kobza and bandura functioning in the works of Ukrainian and Russian organologists of the second half of 20th and the beginning of 21 centuries – A. Humeniuk, K. Vertkov, M. Khai, M. Prokopenko, L. Cherkaskyi, V. Kushpet, as well as individual bandura players.

Kobza or bandura in Andrii Humeniuk's concept.

The famous Ukrainian organologist A. Humeniuk examines kobza (or bandura) in his monograph "Ukrainian Folk Musical Instruments" (1967), assigning them to the strings on which the sound was produced by a pinch¹.

The author, in the historical reference on these instruments origin, development and existence, treats kobza and bandura as a single instrument (in the traditions of Ukrainian traditional organology). The organologist, when giving an assessment of the two controversial theories of these instruments origin – the migratory theory by A. Famintsyn and the autochthonous theory by H. Khotkevych – indicates the bias and one-sidedness of each of them, since "the first <...> did not take into account the folk's creative initiative

¹ Gumeniuk A. (1967) *Ukrainiński narodnimuzychniinstrumenty*. Kyiv: Naukova dumka, p. 58.

(! – I. Z.), conditioned by its life and artistic needs, preferring adoption, and the other one did not recognize the adoption at all”². Instead, the researcher does not propose his own concept for this type of instrumentation genesis and ways of development, being captured by the Soviet theory of society class stratification and class-based “struggle of the Ukrainian people for social and national liberation”.

Humeniuk, sharing A. Famintsyn’s opinion about bandura as a lute type instrument with a gusli-like phonation, was the first of the Ukrainian organologists to pay attention to A. Famintsyn’s prophetic assumption that “the Cossack rhapsodes-singers, while creating a new required instrument, adopted general lute structure (body with a fingerboard) and placed basses on the fingerboard. In addition, they transferred gusli strings on the body and called them *prystrunky* (short strings). <...> Thus, kobza or bandura combined elements of the eastern lute and Slavic gusli”³. A. Humeniuk also agrees with A. Famintsyn that idea of *prystrunky* evolved under the influence of the image of Russian (? – I. Z.) gusli. When answering to the question: “why this new instrument was called kobza, and later bandura?” the author gives an unambiguous answer: “The Slavic peoples and neighboring non-Slavic ethnic groups called the stringed musical instruments of various type as kobza”. That is why the Ukrainians “traditionally called the new instrument they created a kobza”⁴.

The researcher believes that kobza became an autochthonous musical instrument that the peoples of Ukraine generally mastered only in the late XVI – early XVII centuries, in connection with which the kobza players “began searching for a new name” (? – I. Z.). It was at this time that “attention was paid to the names of existing same-type (apparently lute-like – I. Z.) instruments of other peoples”⁵. Since kobza was not only similar to a lute, but also built on its basis, “*there was no great difference between the kobza and bandura’s structures*” (italic type added – I. Z.), in connection with which “kobza was also called bandura”⁶. According to the author, this instrument still bears a double name.

² Gumeniuk A. (1967) *Ukraiinski narodni muzychni instrumenty*. Kyiv: Naukova dumka, p. 68.

³ Gumeniuk A. (1967) *Ukraiinski narodni muzychni instrumenty*. Kyiv: Naukova dumka, p. 73.

⁴ Gumeniuk A. (1967) *Ukraiinski narodni muzychni instrumenty*. Kyiv: Naukova dumka, p. 73.

⁵ Gumeniuk A. (1967) *Ukraiinski narodni muzychni instrumenty*. Kyiv: Naukova dumka, p. 73.

⁶ Gumeniuk A. (1967) *Ukraiinski narodni muzychni instrumenty*. Kyiv: Naukova dumka, p. 74.

According to A. Humeniuk, bandura in those days, when it was called kobza, could not be three-stringed, with a narrow long fingerboard – an instrument with apIucked phonation. Kobza, like gusli, has always been a plucked instrument. In addition, neither in structure nor in number of strings could it in the XV – XVI centuries be more primitive than the lute-like instrument depicted on the medieval fresco in the Cathedral of St. Sophia “Musicians” (XI c.): “What was the need for Ukrainians to create a new instrument, more primitive than existing ones?” – the author asks rhetorically⁷. It is worth noting that the history of organology knows many cases when not only highly developed, extremely sophisticated instruments, but also huge layers of instrumental culture (together with the spiritual and material ones) died with the change of socio-historical formations. Possibly, a two- and three-stringed kobza (with a long neck) could have been adopted from the nomadic peoples of the Steppe later within the period of the Kyiv state decline (after 1240 – until the victory over the Golden Horde in the Battle of Kulikow (1380) and subsequent formation of Grand Duchy of Poland and Lithuania (1407) The ancient kobza could have had a specific ethnocharacteristic detail – *prystrunky* absent in simultaneously existing lute-like instruments of other European peoples. Therefore, according to Humeniuk, “when it comes to the Ukrainian kobza of ancient times one should prefer to an instrument with *prystrunky* <...> more sophisticated than gusli” (? – I. Z.)⁸. The latter, according to the organologist, became the basis for the creation of a more sophisticated kobza or bandura (? – I. Z.), which ousted them from the musical life of Ukraine.

A. Humeniuk rightly associates the modern development of the instrument (bandura) with the name of H. Khotkevych, a professional bandura player of the new type, who for the first time introduced structural changes in the traditional instrument in the 1920s and 1930s, such as: asymmetric displacement of the neck relative to the body, increasing the number of strings and *prystrunky*, partial pitch chromatization using the moving levers and string supports). The variety of string tuning (Lydian– by O. Veresai, P. Bratytisia, H. Honcharenko, Phrygian – bandura described by A. Rubets, and Dorian – bandura by M. Kravchenko and A. Gepuba) in ancient bandura depended on many factors: regional traditions, the nature and range of the performer’s voice, type of repertoire, aesthetic sound, personal tastes and preferences of kobza players. Depending on the content of the genre, nature of

⁷ Gumeniuk A. (1967) Ukraiïnski narodni muzychni instrumenty. Kyiv: Naukova dumka, p. 74.

⁸ Gumeniuk A. (1967) Ukraiïnski narodni muzychni instrumenty. Kyiv: Naukova dumka, p. 74.

work the strings have been retuned several times, so when searching for new acoustic indicators of the instrument and increasing the number of *prystrunki*, it became necessary to create an instrument with a chromitized scale (O. Korniyevskiy, I. Skliar, V. Tuzychenko, V. Herasymenko). The use of the instrument under new conditions (in particular, in the ensemble performance) raised a question of creating bandura family (V. Tuzychenko, I. Skliar) for professional and amateur chapels of bandura players.

Thus, in the development of Ukrainian string-plucked instruments of the kobza tradition, A. Humeniuk stands on the positions of the vulgar-evolutionist theory inherent in the Soviet period of development of the Ukrainian organological science, simplifying the emergence and development of each subsequent instrument based on the previous one through its displacement from the musical and historical practice by other (gusli – kobza – bandura – modern academic bandura). The author's lack of understanding of the instruments historical evolution is evidenced by at least an explanation of impossibility of existence in the Ukrainians of a long-necked three-stringed kobza (long neck lute) on the basis of existence of a five-stringed plucked lute-like instrument on the medieval Ukrainian fresco (the Cathedral of St. Sophia, XI century)⁹, which belongs to the type of short-neck lute (with rearpins). The long neck lute itself could have appeared on anti-Ukrainian lands long before the formation of the Kievan Rus (according to Ibn Fadlan). Thus,

1. A. Humeniuk was the first Ukrainian organologists to draw attention to A. Famintsyn's idea of bandura origin from the Russian gusli (without specifying, in fact, *what type exactly* and why Russian, not medieval East Slavic, narrower – ancient Ukrainian), as evidenced by *prystrunki* location on the instrument body. (Given the fact that A. Famintsyn considered *prystrunki* as “purely Ukrainian invention”!).

2. According to A. Humeniuk, the plucked mode of play on kobza-bandura, as on gusli, correlates this lute-like chordophone with the latter, while the researcher rejects completely the possibility of plucked phonation, the existence of which was undoubtedly indicated by M. Lysenko and A. Famintsyn.

3. In substantiating the affinity of bandura with gusli as an instrument that combines elements of the eastern lute and Slavic gusli, the researcher does not consider it necessary to specify the type of instrument itself, which, when changing the method of holding and a manner of play, can no longer be interpreted solely as *struck string lute type chordophone*.

⁹ 1970s studies showed that on the original image from St. Sophia's fresco (XI c.), the lute instrument had three strings.

Kobza and bandura in Konstantin Vertkov's concept.

K. Vertkov studied the issue of the Ukrainian struck stringinstruments origin of kobza tradition in contemporary Russian organology. His exploration of "Regarding issue the Ukrainian Kobza" (1972) became a major contribution to the study of Ukrainian struck stringinstruments¹⁰. The scientist focused his attention not only on the critical review of written sources, but also on a detailed analysis of the instruments from Ukrainian iconography of XVII – XIX centuries, in particular, from the Ukrainian folk paintings "The Cossak Mamay" with the image of a kobza.

The author, noting the synonymy of using terms "kobza", "bandura" and "lyre", often referred to as kobza in common terms, critically approaches the widely quoted in "Dictionary" by B. Linde of the statement "kobza <...> with three strings", indicating that the specified number of strings could only refer to the organistrum¹¹. Following A. Humeniuk, the author is inclined to believe that the inaccurate reading of B. Linde's text by later authors has led to the fact that the oldest Ukrainian kobzawas considered to be a three-stringed (L. Golembiovskiy, A. Sovinskyi, A. Famintsyn, H. Khotkevych). The identification in the national vocabulary of the words "kobzar" and "lirnyk" is associated with the use of the term "kobza" with a completely different type of instrument – "<...> lyre, which can be explained not as much by the peculiarities of the individual design of these instruments, but their typical function they performed in the Ukrainian (Cossack and Rural) environment as rhapsody instruments, as well as common repertoire"¹². The author explains thus the synonymy of using the names of three instruments – kobza, bandura and lyre.

According to K. Vertkov, the Ukrainian iconographic monuments of the XVII – XIX centuries – folk paintings "The Cossak Mamay" are of decisive importance in addressing the issue of the Ukrainian kobza origin. As mentioned above, H. Hotkevych was the first one whoused the iconography of kobza images depicted in the "Mamays" in organological analysis, who unfortunately could use a rather limited number of images (6), with only one type of instrument, which prevented him from making broader generalizations.

The researcher, when studying instruments from paintings, first published in the study of P. Biletsky's "The Cossak Mamay" – Ukrainian folk painting"

¹⁰ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folkloru narodov SSSR / Sbornik statyey. Moskva: Muzyka, pp. 275–284.

¹¹ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folkloru narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 276.

¹² Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folkloru narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 278.

[1], observed the presence in the plots of paintings of two different types of plucked chordophones – with long and short necks (according to K. Vertkov – tambourine and lute-like)¹³.

The instruments of the first group have a hemispherical or oval body, a long narrow neck and a straight head, slightly bent back or turned volute-forward. We find this form, analyzed by H. Khotkevych, more often. The longneck kobzas on the paintings are reproduced both with frets and without¹⁴ (perhaps, they were not always depicted by folk painters, because, according to ancient traditions, fretswere imposed for some ancient instruments – *I. Z.*). Kobzas are depicted on the paintings of the XVII – XVIII centuries with 3–4 frets.

The instruments of the second type have a pear-shaped body, a short neck and a head, bent back at right angle (as lute). Kobzas of this type depicted at the “Mamays” of the end of the XVII – XVIII centuries. They are not preserved in the Ukrainian traditional instruments of the XIX century; although still exist in the Romanian and Moldovan ones (in the ensemble tradition of *lăutari*).

In longneck kobza with frets, depicted in paintings of the XVII – XVIII centuries, each string (together with the thumbstring) had a range in the volume of quint or sixth. However, onepaintingdated the beginning of the XIX century, shows the cossack playing kobza with ten frets, the lower four of which are located under the first (thumbstring), that is, used to play the melody in head tone. Based on this observation, K. Vertkov concludes on a much broader fret-line volume and expressive capabilities of the ten-fret instruments of the XIX century testifying to the high development of performance technique¹⁵.

Both types of instruments (long and short necks) are depicted predominantly with the same number of strings (four single or double-choral). They are combined by the same playing style (position of Cossack musician’s hands) and the manner of holding the instruments. A detailed analysis of the play mode (with all five fingers with active function of the little finger) gave the scientist grounds to conclude on the highly developed play technique on both kobza types¹⁶.

¹³ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folkloru narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 279.

¹⁴ H. Hotkevych failed to observe this.

¹⁵ Vertkov K. (1973) Bandura. Muzykalnaya entsyklopediya: V 6 t. T. 1. A–G / Glav. red. G.V. Keldysh. Moskva: Sovietskay aentsyklopediya, Vol. 1, p. 315.

¹⁶ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folklore narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 280.

The rhapsodic instrument development of the Ukrainian kobza-professional tradition, according to K. Vertkov, gradually “led to the formation of a *new kind of kobza*, which combined two different instruments – a tambourine-like(long neck – *I. Z.*) the neck of which lost the function of the fingerboard with frets, and the cittern-like that gave rise to “*prystrunki*” <...>”¹⁷. With regard to this new version, the author, following Famintsyn, saw the unification of functions of the East Slavic *gusli* of helmet-like type (with no strings shortening during play) and the Ukrainian kobza¹⁸. In the author’s opinion, the likelihood of the interaction between *gusli* and kobza is more likely given that both instruments were used simultaneously in the national center of kobza art – the Zaporozhian Sich¹⁹. The author considers the helmet-shaped East Slavic *gusli* as the *gusli* with horizontal holding mode.

The image of such a *hybrid instrument with prystrunki* was first presented by Ukrainian historian O. Rihelman (1785); it is captured on the Ukrainian folk paintings of the 1830s. The instrument depicted in the painting by O. Rigelman is a typical short neck lute (kobza). It has an oval body, a wide (with no frets) neck and a steeply bent back head. The instrument depicted in the painting “The Cossack Mamay” of the 1830s is a typical long neck modal lute (with four short melodic strings on the sounding board). The first instrument illustrates the kobza player of the XVIII century, the second one (as can be seen from the inscription under painting “Hey, my bandura”) reproduces the bandura player, which indicates the synonymy of using the terms “kobza” and “bandura” in the first decades of the XIX century.

According to K. Vertkov (and O. Famintsyn), the *ancient bandura had no prystrunki*, as confirmed by German authors (Berchholtz, Stelin, and Bellerman). They all described the bandura (i.e. the European lute of the Baroque – bandora – *I. Z.*) in the same way. Hence, K. Vertkov concludes that *there were no prystrunki on the ancient banduras; they are an attribute of kobza exclusively*.

According to K. Vertkov, the short neck kobza disappeared in Ukraine due to “uncompetitiveness” with a longneck one, which had the ability to add short (melodic) strings – *prystrunki*. If the short neck kobza covered a wide Eastern European area (the territory of modern Ukraine, Poland, Moldova, Romania), then the *long neck kobza was widespread in Ukraine only*. In the course of historical development (approximately from the end of the

¹⁷ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folklore narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 281.

¹⁸ Vertkov K. (1973 a) K voprosu ob ukrainskoy kobzye. Problemy muzykalnogo folklore narodov SSSR / Sbornik statyey. Moskva: Muzyka, p. 281.

¹⁹ It is still unknown what form and method of holding *gusli* had in the Zaporozhian Sich.

XVIII century), due to the growth of the accompanying function, *this type of kobza replaced an “urban” bandura* (? – I. Z.).

K. Vertkov associates the appearance of kobza in the Ukrainians with the era of modern Ukrainian nation formation (XIV-XV centuries), when a *dumagenre* emerged, inextricably associated with kobza. According to the organologist, Ibn-Fadlan’s testimony (X century) on the existence of instruments in the Eastern Slavs similar to the “yidan” (Arabic al-ud – I. Z.) cannot be considered as the original prototype for the Ukrainian kobza, at least because the term “kobza” was not used in the written sources of the Ancient Rus.

Therefore, in K. Vertkov’s concept of bandura origin, the following points should be emphasized:

1. Studying the instruments from the Ukrainian folk paintings “The Cossack Mamay”, the organologist for the first time identified two types of Ukrainian neckstruck string chordophones: lute- and tambourine-like kobza (according to the Hornbostel–Sachs systematics – short- and longneck lute-like instruments)²⁰.

2. The author considers the terminological way of establishing the similarity of instruments used by A. Famintsyn and H. Khotkevych to be extremely dangerous, since it leads to typological (and genetic) polysemy and leads organologists on the wrong track.

3. The organologist does not correlate the formation of a new type of hybrid instruments – kobza with *prystrunki* – with bandura formation. In his opinion, *the ancient bandura had no prystrunki*.

4. The organologist attributes bandura origin to the phenomenon of adding *prystrunkito* long neck lutes, since short neck instruments in Ukraine, in his opinion, due to “uncompetitiveness” disappeared eventually from use and could not become a prototype for kobza with additional string carrier – a body.

5. Developing the idea of A. Famintsyn and A. Humeniuk about bandura hybridization on the basis of two instruments (according to A. Famintsyn and A. Humeniuk – bandura and *gusli*, in K. Vertkov’s concept – long neck kobza and helmet-like *gusli*), the organologist unfortunately fails to develop it further. According to K. Vertkov, Russian *gusli* were of three types: wing-like – in the form of wings, helmet-like or psalter – like (“helmet-like” – in the form of an equilateral triangle) and rectangular or table-like (“table-like” – footed, by clavichord type), a historically later variety²¹. So, Vertkov’s

²⁰ In our work, we use the terminology of C. Sachs – E. Hornbostel.

²¹ Vertkov K. (1972) *Tipy russkih guslyey*. Slavyanskiy muzykalnyy folklor. Moskva; Leningrad: Sovietskii kompozitor, pp. 276–279.

systematization is based on the instrument shape²². At the same time, the players held the helmet-like and wing-like gusli on their knees during performance²³, i.e., horizontally. The organologist does not mention any other possible means of holding these; so, apparently, the vertical way of holding was unknown to him.

Supporting Famintsyn's hypothesis of bandura hybridization with gusli, K. Vertkov, unfortunately, does not solve the issue of how the manner of playing the instrument could change; he does not say anything about changing the way it is held. After all, the horizontal way of holding traditional Russian helmet-like gusli could not be applied to the bandura, which the performers never held horizontally contrary to the torban and lyre, but always perpendicularly with a certain inclination or pressing against the chest.

Kobza and bandura in Mykhailo Khai's concept.

M. Khai puts forward rather original theory of bandura and kobza evolution as instruments of the kobza-gusli tradition in his monograph "Musical and Instrumental Culture of the Ukrainians (Folklore Tradition)", 2007 (2nd ed. 2011). The researcher, developing basic idea of traditional (Russian and Ukrainian) organology regarding bandura inheritance of the gusli mode of play (Famintsyn, Khotkevych, Humeniuk, and Vertkov) and analyzing gusli types given in M. Lysenko's work, identifies three well-known types of these instruments widespread in the Slavic world: 1) the oldest wing-like, 2) helmet-like (gusli-psalter), and 3) table- or clavier-like (according to K. Vertkov). At the same time, M. Khai notes that the first type (recorded by K. Vertkov almost 65 years later on Russian material) in M. Lysenko's classification is absent. This is not surprising, since in the times of M. Lysenko medieval wing-like gusli were an unknown instrument known only from Czech written sources (the so-called Bohemian wing): Russian archaeologists discovered this type of gusli during the excavations of Ancient Novgorod in the middle of the XX century. In Ukraine, since the late Middle Ages, other types of vertically held gusli have displaced it. Concerning bandura origin, the researcher puts forward an interesting hypothesis, according to which the wing-like gusli "... in form and structure were closest to the historically inevitable transition of a cittern-like instrument – gusli – into a lute-like bandura"²⁴.

²² Vertkov K. (1972) *Tipy russkikh guslyey*. Slavyanskiy muzykalnyy folklor. Moskva; Leningrad: Sovietskii kompozitor, p. 275.

²³ Vertkov K. (1972) *Tipy russkikh guslyey*. Slavyanskiy muzykalnyy folklor. Moskva; Leningrad: Sovietskii kompozitor, pp. 276, 278.

²⁴ Khay M. (2011) *Muzychno-instrumentalna kultura ukraintsiv (folklor natra dytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 49.

Offering his own classification of Ukrainian traditional chordophones, the author first characterizes *gusli* as a plucked neck-free instrument (next to *bandura* (!? – *I. Z.*) and subsequently – as a plucked percussion instrument (!? – *I. Z.*) together with cymbals²⁵. The researcher tries to supplement generally accepted in Russian organology classification of *gusli* by three main types (K. Vertkov) with the fourth one – few strings (? – *I. Z.*) or the so-called archeological *gusli*, “called so as opposed to “ethnographic”, with more strings”²⁶. At the same time, the organologist notes that the researchers-*bandura* players (V. Yemets) assign these *gusli* to the “instruments of a *gudok* type” (? – *I. Z.*), that is, a violin-type bowed chordophone (!), but with a vertical holding mode (that is, eastern one – *I. Z.*). Here, the author refers to the picture No. 18 in the attachments to his monograph (page. 516), which should illustrate the Russian medieval *gudok* – ancient Slavic violin, which was held vertically during play. However, the above mentioned picture shows the Naddniprianski cymbals, not *gudok* (*gudok* is shown on another picture – No. 23 on page 518)²⁷.

The author classifies *kobza* as an instrument of *kobza-lute family*²⁸. *Bandura*, in his opinion, “is genetically derived from a zither-*gusli*-like... type”²⁹. In his studies of the 1990s the author, developing the ideas of H. Khotkevych and S. Hrytsa, proposes a hypothesis of the *historical and staged development of the Ukrainian epic instruments* – *gusli*, *bandura*, and *kobza* (as a refutation of the existing version of *bandura* origin from *kobza*), that is, the transformation of “diatonic and pentatonic” (? – Ugro-Finnish – *I. Z.*) *gusli* into *bandura* with diatonic structure³⁰. The author considers *kobza* as a type of synthesized (? – *I. Z.*) instrument (with fingerboard and *prystrunki*) – “Ukrainian analogue of the Eastern *kobuz* and European lute transformed under Ukrainian setting into the form and structure of popular in this setting *bandura*”³¹.

²⁵ Khay M. (2011) *Muzychno-instrumentalna kultura ukraïntsiiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 106.

²⁶ Khay M. (2011) *Muzychno-instrumentalna kultura ukraïntsiiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 107.

²⁷ Review of the mentioned works by V. Yemets and G. Tkachenko did not confirm the author’s appeal.

²⁸ There is no such family according to the E. Hornbostel – C. Sachs systematics or the Russian modern systematic.

²⁹ Apparently, the author refers to the zither-like type of chordophones (according to C. Sachs).

³⁰ Khay M. (1994) *Gusli, bandura i kobza yak instrumenty riznykh faz evoliutsii ukraïnskoiï epichnoiï tradytsii*. Proceedings of the Kobzarsko-lirnyiïski tradytsii ta yikh suchasnyi rozvytok: (Ukraine, Kyiv, April 25-26, 1993) (eds. Hrytsa S. Yo., Ivanytsky A. I.), Kyiv: IMFE, p. 25.

³¹ Khay M. (1994) *Gusli, bandura i kobza yak instrumenty riznykh faz evoliutsii ukraïnskoiï epichnoiï tradytsii*. Proceedings of the Kobzarsko-lirnyiïski tradytsii ta yikh suchasnyi rozvytok. Kyiv: IMFE, p. 26.

In our opinion, M. Khay's hypothesis of the staged-chronological development of the Ukrainian struck string instruments applied to the "transformation <...> of zither-like gusli into a lute-like bandura"³², requires some correction, since bandura with short melodic strings it adopted from the vertically held gusli was formed as a traditional instrument of the Ukrainians at a time when the medieval and baroque vertical gusli-psalter, at least since the second half of the XVIII century, started disappearing from use. Nevertheless, the "genetic memory" of the people has been preserved about the method of holding the instrument and the method of play, which are the *most stable features in the national instruments evolution...*

Also the quasi-quotation from M. Khai's monograph on the archeological (few strings) gusli appurtenance "to a separate category of "instruments of *gudok* type" (? – I. Z.)"³³ [6, p. 107], one must think that it belongs to the author himself, while in the researcher's reference to the work by V. Yemets "Kobza and Kobza Players" (1923) this opinion is missing. Developing his concept, M. Khai notes that only wing-like gusli relate to the development of struck string instruments of the epic East Slavic tradition, which "in the North Slavic (i.e. modern Russian – I. Z.)... lands, having lost <...> their ethno-organologic (? – I. Z.) traits, acquired the features of the newest ones (balalaika)"³⁴. In Ukraine, according to the author, the wing-like gusli most likely "transformed into an instrument of bandura-*duma* epic tradition (into bandura wing-likeshape)" (? – italic type added – I. Z.)³⁵. In this case, the interpretation is unclear of bandura evolution line from kobza, which contradicts the classification of bandura by the author as a hybrid type instrument. Let us recall that the wing-like gusli have two varieties – with an opening in the widest part, that is, lyre-like³⁶ [18], and without it. Gusli without opening could not have influenced the radical transformation thereof into another type of chordophone (lute-like) either by the mode of holding (horizontally on the knees) or phonation method).

³² Khay M. (1998) *Geneza i evoliutsiia kobzarskoho instrumentariiu u svitli etno-instrumentoznavchoii kontseptsii Hnata Khotkevycha*. Dyvosvit Hnata Khotkevycha: Aspekty tvorchoii spadshchyny. Kharkiv: KhIM imeni I. Kotliarevskoho, p. 119.

³³ Khay M. (2011) *Muzychno-instrumentalna kultura ukraiintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 107.

³⁴ Khay M. (2011) *Muzychno-instrumentalna kultura ukraiintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 107.

³⁵ Khay M. (2011) *Muzychno-instrumentalna kultura ukraiintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 101.

³⁶ Zinkiv I. (2004) *Bandura yak istorychnyi fenomen*. Zapysky Naukovoho tovarystva imeni Shevchenka: Pratsi Muzykoznavchoii komisii / Red. O. Kupchynskyi. Lviv: NTSH imeni Shevchenka. Vol. CCXLVII, pp. 392–401.

The author, insisting on the appurtenance of hypothesis on natural transformation of the epic-gusli tradition instrument into *dumy*-bandura tradition (not *dumy*-kobza – I. Z.) by G. Tkachenko (although the latter never spoke of change in the external shape of the lute-like bandura, stating only the *change to the helmet-like gusli holding method*)³⁷, invokes the well-known conclusions of S. Hrytsa and A. Ivanytskyi about historical inheritance of the ancient Ukrainian epic-gusli and kobza-*duma* traditions³⁸. Based on Khotkevych's a priori view of the autochthonous origin of most traditional Ukrainian instruments, the researcher does not support the generally accepted in organology idea of “kobza bandura” evolution and adheres to his own concept, “more substantial” (! – I. Z.) than previous versions, <...>, since [it] is “imposed” logically not only on the evolutionary-ergological series of instruments structure involved in the transformation”³⁹. According to the researcher, the diatonic bandura of the category of simple (neck-free) chordophones (? – I. Z.)⁴⁰ is closer in classification of Hornbostel–Sachs systematics to gusli (index 321.32. -5)⁴¹ than kobza, which the author considers as “an instrument of the complex aerophones category (??? – I. Z.)⁴²”. It follows from the further exposition that “the folk (old-world) bandura is a struck string lute instrument of *wing-like* (? – I. Z.) shape formed as a result of zither-like ancient Ukrainian gusli transformation, acquiring under the influence of the European (? – I. Z.) tradition lute-like shape⁴³. The definition given by the author denies the previous one; furthermore, it is unclear how a single instrument (traditional bandura) can simultaneously combine the shape of two instruments at the same time – a wing-like gusli (i.e., an instrument of a wingshape) and a lute (neck chordophone)? The researcher, apparently, is not fully aware of the typical differences between wing- and helmet-like gusli, as picture No. 19, page 495 of the monograph “Musical and Instrumental Culture of the Ukrainians”, shows different in shape and type gusli: 1) helmet-like, that is of triangular shape (upper

³⁷ Tkachenko G. (1995) *Osnovy hry na narodnii banduri (avtentychnyi zapys)*. Cheremskiy K. Povernennia tradytsii. Kharkiv: Tsentr Lesia Kurbasa, pp. 223–229.

³⁸ Khay M. (2011) *Muzychno-instrumentalna kultura ukraïintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 107.

³⁹ Khay M. (2011) *Muzychno-instrumentalna kultura ukraïintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 107.

⁴⁰ Bandura never belonged to simple neck-free chordophones, the instrument always had a fingerboard.

⁴¹ Hornbostel–Sachs systematic does not list gusli as an instrument.

⁴² Obviously, this is an unfortunate lapsus of the author, as kobza, according to Hornbostel-Sachs system, is classified as complex chordophones.

⁴³ Khay M. (2011) *Muzychno-instrumentalna kultura ukraïintsiv (folklorna tradytsiia)*. Kyiv; Drohobych : NANU, IMFE, NMAU imeni P. I. Chaikovskoho, p. 109.

instrument) and 2) wing-like gusli with opening, that is, lyre-like (two lower instruments). The latter are reconstructed by G. Pavlychenko Novgorod five- (XI century) and nine-stringed (XIII century) medieval gusli. The author, for unknown reasons, combines them into one type – wing-like gusli, as evidenced by the inscription under picture on page 495. Thus, M. Khai's concept is currently the most controversial of all existing ones and needs further refinement.

Kobza and bandura in M. Prokopenko's concept.

Mykola Prokopenko, the researcher and bandura player, referring to C. Sachs, derives bandura origin and name from the Sumerian neck instrument “pan tur” (III millennium BC), translated as a “small bow”⁴⁴. (As we know, C Sachs has never spoken in his works about the link between *pan tur* and *bandura*.) The author notes that the name of the Arab-Persian tanbur arose from the accidental rearrangement of the letters in the words “*pan tur*”, and not vice versa, as A. Famintsyn thought. Hence, the incorrect conclusion that “<...> bandura is not a tambourine-like instrument, but, on the contrary, a tanbur is a bandura-like (? – I. Z.)”⁴⁵. Acknowledging the existence in many peoples of the Caucasus and Transcaucasus (the Georgians, the Abkhazians, the Adzharians, the Ossetians) of neck instruments called *panduri* and *fandur* (which C. Sachs regards as adopted by these peoples from the Sumerians⁴⁶), and analysing the political situation of the Kievan Rus in the XIII – XVI centuries (? – I. Z.), M. Prokopenko makes a conclusion about Ukrainian bandura succession with its ancient “ancestor” *pan tur*, which came to Ukraine through centuries – old contacts with the Caucasian peoples. The author gives information about numerous long-lasting wars, settlements of the Circassians, the Ossetians, the Abkhazian and the Georgians in Ukrainian lands in the first decades of the XIV century. According to M. Prokopenko, both the name and the prototype of the original bandura became known in Ukraine only in the XIV century⁴⁷.

Prokopenko's concept is incorrect, since it is proved (V. Abaiev) that the word “bandura”, along with the Scythian ethnic group, found way into to the south of Ukraine and the Caucasus from the depths of Asia Minor at the dawn of our day. Abaiev dates the appearance of *pan tur* (*fandir*) in the Caucasus to the Scythian-Sarmatian age, and associates the pervasion of bandura lexical

⁴⁴ Sachs C. (1975) *Historja instrumentów muzycznych*. Warszawa : PWM, p. 80.

⁴⁵ Cherkaskyi L. M. (2003) *Ukrayinski narodni muzychni instrumenty*. Kyiv: Tekhnika, p. 122.

⁴⁶ Sachs C. (1975) *Historja instrumentów muzycznych*. Warszawa : PWM, p. 80.

⁴⁷ Cherkaskyi L. M. (2003) *Ukrayinski narodni muzychni instrumenty*. Kyiv: Tekhnika, p. 123.

item into the Caucasus with the Scythian colonization of this region⁴⁸. Therefore, in Ukraine, the ethnonym bandura (panjtor) could not pervade from the Caucasus, but existed since the time of Scythian culture domination in the Ukrainian territory.

Kobza and bandura in L. Cherkaskyi's concept.

Leonid Cherkaskyi in the study "Ukrainian Folk Musical Instruments" analysing traditional organological works, tends to the idea of classic organologists about the oriental origin of kobza and its name. Supporting the hypothesis of the Ukrainian kobza eastern origin under the influence of contacts with the Turkic-speaking world⁴⁹, the author does not reject the autochthonous hypothesis of H. Khotkevych, noting, however, that there is no evidence to support it.

L. Cherkaskyi considers it reasonable to distinguish between *two stages* in the instrument development – the old one, which provided for the presence of two or three gut strings (from the XV to the first half of the XVIII century), when, according to Khotkevych, kobza was a "common" instrument and the newest (autochthonous) one – from the second half of the XVIII century⁵⁰, which provided for the presence of *prystrunki*, without motivating the lower chronological limit of the newest instrument appearance in the Ukrainian territory.

It is significant that the author classifies the modern-day kobza (with *prystrunki*) as a lute-like instrument with *two string carriers – a fingerboard and a sounding board* (or rather the body – *I. Z.*). This observation prompted the organologist to interpret the *newest kobza as a zither of a lute-like shape* with the preservation of two modes of play (according to E. Hornbostel – C. Sachs systematics its index is 321.(3+1) 32–5)⁵¹. The author believes that the authentic modalkobza disappeared in the early XIX century.

The author, while studying bandura, agrees with M. Prokopenko on its genesis and origin of the name, but states: "Preferring precisely this "Caucasian" version of the primary bandura origin in Ukraine, we consider it necessary to emphasize that these "common" instruments against the background of Ukrainian musical culture, its well-established struck string (gusli) instrumentation, and the epic tradition characteristic of the Ukrainians,

⁴⁸ Kaloyev B. A. (1969) Niekotoryye etnograficheskiye paralleli k osyetinskomu nartovskomu eposu. Skazaniya o Nartah – epos narodov Kavkaza. Moskva: Nauka, p. 186.

⁴⁹ Cherkaskyi L. M. (2003) Ukrayinskinarodnimuzychniinstrumenty [Ukrainian Folk Musical Instruments]. Kyiv: Tekhnika, p. 108.

⁵⁰ Cherkaskyi L. M. (2003) Ukrayinski narodni muzychni instrumenty. Kyiv: Tekhnika, p. 109.

⁵¹ Cherkaskyi L. M. (2003) Ukrayinski narodni muzychni instrumenty . Kyiv: Tekhnika, p. 110.

have undergone changes, resulting in their own Ukrainian national instruments ...”⁵².

Like the development of kobza, L. Cherkaskyi also distinguishes two stages in the bandura evolution: 1) from its appearance in Ukraine to the second half of the XVIII century, and 2) from the second half of XVIII century to date. The author refers to the first stage of development the existence of instrument without *prystrunki*, with lute-like mode of phonation (the so-called primary bandura); during the second stage, the autochthonous Ukrainian bandura is being established as “an instrument which organically combines the features of the lute-like and gusli-like instruments”⁵³. The organologist sees the differences between kobza and bandura in increased number of strings (from 3 to 4 in kobza to 8 in bandura), as well as in some features of their shape: “kobza had a longer and thinner handle, smaller body”⁵⁴. The author described other structural differences between kobza and bandura in the article “On the issue of identifying kobza and bandura”⁵⁵, where he emphasizes different ways of phonation: “gusle-like” (digital – *I. Z.*) on bandura and lute-like – on kobza⁵⁶.

From L. Cherkaskyi’s concept analysis it follows that the author assigns both kobza with *prystrunki* and bandura to the type of hybrid instruments, seeing the differences between these lute-like in shape instruments only in the size of the body, neck parameters and unequal number of strings, without taking into account the differences in the modes of playing and holding instruments.

Kobza and bandura in Volodymyr Kushpet’s concept.

Volodymyr Kushpet, critically reviewing, like other contemporary authors, the provisions of classic studies on the origin of bandura (in particular, from kobza), in the monograph “Mendicancy: traveling singers-musicians in Ukraine” (2007) pays special attention to the specific ways of kobza and bandura phonation, in particular, on the instrument of O. Veresai. The manner

⁵²Cherkaskyi L. M. (2003) Ukrayinski narodni muzychni instrumenty. Kyiv: Tekhnika, p. 123.

⁵³Cherkaskyi L. M. (2003) Ukrayinski narodni muzychni instrumenty. Kyiv: Tekhnika, p. 128.

⁵⁴Cherkaskyi L. M. (2003) Ukrayinski narodni muzychni instrumenty. Kyiv: Tekhnika, p. 128.

⁵⁵Cherkaskyi L. (2007) Ukraïnskyi narodnyi muzychnyi instrumentarii na mezhi tysiacholit: Mystetski zapysky viddilu ukrajinskykh muzychnykh instrumentiv Muzeiu teatralnoho, muzychnoho ta kinomystetstva Ukraïny [Upor. L.M. Cherkaskyi]. Kyiv: DAKKKiM, pp. 60–61.

⁵⁶Cherkaskyi L. (2007) Ukraïnskyi narodnyi muzychnyi instrumentarii na mezhi tysiacholit: Mystetski zapysky viddilu ukrajinskykh muzychnykh instrumentiv Muzeiu teatralnoho, muzychnoho ta kinomystetstva Ukraïny [Upor. L.M. Cherkaskyi]. Kyiv: DAKKKiM, p. 60.

of kobza player's phonation⁵⁷ with strings being pressed to the fingerboard (neck) of the instrument, first characterized by M. Lysenko and H. Khotkevych, indicates that it was a kobza (without frets-nuts), although in parallel the kobza player used another method of phonation. Considering the method of playing using Veresai's instrument, which had 6 long and 6 short strings, V. Kushpet tends to the opinion of the Kyiv guitarist Y. Pukhalskyi (author of "Bandura play teaching method", 1978) that the fingerboard strings of the Veresai's instrument may well perform a full-fledged independent function. Comparison of the performance capabilities of the fingerboard strings with *prystrunki* limited capacities leads the author to a conclusion on the specificity of Veresai's style of play, which combined the playing technique on both instruments – kobza and bandura⁵⁸. The author believes that it is much more convenient to play the Veresai instrument by pressing strings to the fingerboard like on lute-like instruments (lute and guitar), and it is almost impossible to play in the *harp-likemanner*, as on multi-string bandura⁵⁹. Reconstructing the repertoire of O. Veresai using an exact copy of the kobza player's instrument, made by the craftsman M. Budnyk, the author recreated a way of playing in the 1980s, which convinced him of the existence of an independent lute-like instrument – kobza. According to Kushpet, kobza had few *prystrunki* (from two to seven) and, unlike bandura, they performed the function of extending the range of the instrument when playing in one position⁶⁰. However, in our opinion, kobza with *prystrunki* (including the Veresai's instrument) should be attributed to *transitional type instruments*–hybrid instruments, as L. Cherkaskyi does.

Following S. Ludkevych⁶¹, the researcher considers bandura as a *harp-like* multi-stringed instrument, justifying his assumption by the fact that the harp similarity is a commonly accepted definition of struck string instruments family, phonation on which occurs without pressing outstrings when changing their pitch⁶². The increased number of *prystrunki* on kobza, according to Kushpet, led to the emergence of a new instrument that had a completely

⁵⁷ V. Kushpet uses less successful term "sound removal" (remove – eliminate, not produce sound).

⁵⁸ Kushpet V. (2007) Startsvivstvo: mandrivni spivtsi-muzykanty v Ukraini (XIX – pochatok XX c.). Kyiv: Tempora, p. 34.

⁵⁹ Kushpet V. (2007) Startsvivstvo: mandrivni spivtsi-muzykanty v Ukraini (XIX – pochatok XX c.). Kyiv: Tempora, p. 34.

⁶⁰ Kushpet V. (2007) Startsvivstvo: mandrivni spivtsi-muzykanty v Ukraini (XIX – pochatok XX c.). Kyiv: Tempora, p. 384.

⁶¹ Liudkevych S. (2000) Vidrodzhennia bandury. S. Liudkevych. Doslidzhennia. Stati. Retenziyi: U 2 t. T. 2. / Red. Z. Shtunder. Lviv: Vydavnytstvo M. Kots', pp. 182–183.

⁶² Kushpet V. (2007) Startsvivstvo: mandrivni spivtsi-muzykanty v Ukraini (XIX – pochatok XX c.). Kyiv: Tempora, p. 32.

different way of playing –harp-like and “took over the already known in the bourgeois noble environment name of kobza – bandura”⁶³.

Without denying author the expediency of clear and justified delineation of both instruments – kobza and bandura, let us pay attention to the validity of interpreting the latter as an instrument with a harp-likemanner of playing. It is known that phonation using the ancient harps of small size was performed with both hands (except for some medieval instruments, played with one hand while holding them with other one). However, the one-handed way of playing is peculiar to the medieval psalter tradition only –psalters (gusli) of vertical hold, on which the sound was produced not by clanging, but by pinching open strings. Obviously, here we must talk about bandura inheritance *not ofharp-like*, but *psalter-like* mode of playing, since the harp-likemode of play on modern framed harps provides for free bilateral access of both hands of the performer to the open strings, and, in addition, quite different sounding board arrangement relative to the strings. The psalter-likemode of playing, with the parallel arrangement of the sounding board body relative to the strings, involves *unilateral access of the performer to the strings* (like with bandura).

Concerning the definition of the type of instrument itself, it should be noted that V. Kushpet does not raise this issue in his monograph: it is obvious that the author attributes both kobza and bandura to the lute-like instruments, with different modes of play. The harp-like (more properly, the psalter-like – *I. Z.*) mode of playing bandura does not give grounds to interpret it as a harp-like instrument, because harps in the international Hornbostel – Sachs systematics constitute a separate kind of chordophones.

In addition to organologists, the issue of kobza and bandura origin was raised by many Ukrainian and foreign bandura and kobza players, bandura craftsmen and bandura researchers –VasylYemets’ in the work “Kobza and Kobza players” (1923), Zinoviy Shtokalko in “The KobzaTextbook” (1992), Georgii Tkachenko in the textbook “Fundamentals of Playing Folk Bandura”⁶⁴ [13], Mykola Budnyk in his textbook (both in manuscript versions), Kost’Cheremskyi, Andriy Horniatkevych, Viktor Mishalov in the work “Kobza Bandura. The history of multi-stringed Ukrainian national folk instruments”⁶⁵. In agreement with the thesis of the prominent bandura player Khotkevych regarding the autochthonous origin of kobza and bandura, who

⁶³ Kushpet V. (2007) Startsvivstvo: mandrivni spivtsi-muzykanty v Ukraini (XIX – pochatok XX c.). Kyiv: Tempora, p. 384.

⁶⁴ Tkachenko G. (1995) Osnovy hry na narodnii banduri (avtentychnyi zapys). Cheremskyi K. Povernennia tradytsii. Kharkiv: Tsentri Lesia Kurbasa, pp. 223–229.

⁶⁵ Mishalov V. (1987–2005) The kobza-bandura. A history of the multistringed Ukrainian national folk instrument. Toronto. [Manuscript].

first formulated it in the “Bandura PlayTextbook” (Lviv, 1907), the bandura players note that even today the issue of kobza and bandura origin remains open. Based on the facts known in organology, none of the works of the mentioned authors provides enough evidence to shed light on the genesis and origin of this traditional instrument of the Ukrainian culture⁶⁶. Thus, despite the great literature of the subject, the banduragenesis, like the term itself, has not until recently remained an unsolved issue.

CONCLUSIONS

Thus, the works of the Ukrainian and Russian organologists of the second half of 20th – early 21st centuries advanced individual issues on studying the nature of the instrument. Following classic organologists (M. Lysenko, H. Khotkevych), most researchers deduce bandura from the neck chordophones. K. Verkov, the follower of A. Famintsyn, believes that bandura formed as a result of changes in the appearance of gusli, without specifying their type. G. Tkachenko associates the bandura origin with helmet-like (triangular) gusli of vertical holding method. M. Budnyk supports his idea. M. Prokopenko believes that the instrument was brought from the Caucasus and associates it with neck chordophones. L. Cherkaskyi complements the “Caucasian version” of the author with the influence of the medieval struck string instruments of the Slavs. V. Kushpet calls bandura a harp-like instrument. All the theories analysed have shortcomings and do not definitively address the issue of the instrument genesis and typology. In fact, the genesis of bandura and its typological affiliation remains today an open question. In my opinion, bandura preserved the vertical holding and playing mode from the ancient Ukrainian triangular psalters – by pinching strings with a quill, rather than pressing them against the fingerboard, like on a lute-like neck instruments. Therefore, it should be considered a hybrid instrument – a combination of the shape of a short-neck lute and a zither-like instrument with a vertical holding mode. Its index according to E. von Hornbostel – C. Saks systematics should combine the features of zither with a sounding board body played with the use of quill (index 314.122-6) and kobza – neck box-type lutes (index 321.32.), that is, to be the next one – 314.122 – 6 + 321.32⁶⁷.

⁶⁶ G. Tkachenko’s ideas on the nature of each instrument, which “requires only one single mode of play...” are particularly valuable for our study, according to which the bandura player attributes “O. Rubets’s instrument” to the transitional type of lute-like shape, separating Veresai’s kobza from it, on which the kobza player combined two different modes of play.

⁶⁷ Zinkiv I. (2013) *Bandura yak istorychnyi fenomen*. Kyiv: IMFE, p. 311.

SUMMARY

The article analyzes the organological concepts of the Ukrainian and Russian organologists of the second half of 20th – early 21st centuries, in terms of the origin of Ukrainian folk instrument–bandura, and its historical links with kobza. So far, kobza and bandura are considered to be the most debatable instruments in studying the folk music culture of the Ukrainians. The representatives of Ukrainian traditional organology found that kobza and bandura were different instruments, attributed to different types of neck chordophones, with different genesis. Some representatives of the modern Ukrainian Organology School (A. Humeniuk) sometimes ignore this idea.

The interpretation considered of kobza and bandura in the concepts by A. Humeniuk, K. Vertkov, M. Khai, M. Prokopenko, O. Kushpet, and opinions are briefly characterized of the bandura players – V. Yemets', G. Tkachenko, V. Mishalov. It has been shown that researchers do not agree on the genesis and typology of the instruments. Most of them deduce bandura from the neck chordophones, some of them incorrectly determine the phonation method.

In our opinion, the Ukrainian bandura belongs to the hybrid instruments, as it inherited the shape of the body from the short neck lute-like instruments, and play mode, flat body and vertical holding method – from the zither-like instruments. Its index according to Hornbostel–Sachs systematics is 314.122 – 6 + 321.32.

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