JOURNAL OF THE INSTITUTE OF ARTS AND
CULTURAL STUDIES, LATVIAN ACADEMY OF CULTURE

CULTURE CROSSROADS

VOLUME 31
2025

Culture Crossroads is an international peer-reviewed journal published by the Institute of Arts and Cultural Studies of the Latvian Academy of Culture.

Publisher: The Institute of Arts and Cultural Studies of the Latvian Academy of Culture

The journal has been prepared for publication at the University of Latvia Press

Proofreader: Andra Damberga

Layout: Ineta Priga

ISSN 2500-9974

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CREATIVE INTERMEDIARIES AS FUTURE MAKERS: CREATIVE ENTREPRENEURSHIP AND URBAN REGENERATION IN SMALL CITIES

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Abstract

In recent decades, culture and creativity have become essential drivers of urban regeneration. This has increased the role of creative intermediaries in enabling culture, entrepreneurship, and cross-sector collaboration. Yet, few studies demonstrate this relationship outside of large cities, where most cultural and creative activities are concentrated. This paper examines how the practices of creative intermediaries engaged in "future-making" are creating opportunities for Cultural and Creative Entrepreneurship (CCE) and contributing to urban regeneration in two small cities – Cēsis in Latvia and Caldas da Rainha in Portugal. Through case studies from Latvia and Portugal and based on an ethnographic approach, the study highlights how intermediaries operate at the intersection of policy, community, and creative practice. The research contributes new empirical evidence and extends theoretical perspectives on creative intermediation and urban regeneration.

Keywords: *cultural intermediaries, creative intermediaries, urban regeneration, creative entrepreneurship*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.573

ISSN 2500-9974

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Introduction

Creative intermediaries are individuals and organisations that enable and support the work of other creatives [Comunian, England, and Hracs, 2018]. The concept emerged from long-standing theoretical debates on cultural intermediaries, first introduced by Pierre Bourdieu in 1979. Creative intermediaries foster cultural and creative industries (CCI) [Naudin et al., 2022], which are recognised as key drivers of urban regeneration and sustainable development [UNESCO; World Bank, 2021]. The economisation of culture and expansion of the CCI sector over recent decades has increased the need for specialised intermediaries [O'Connor, 2013]. Many operate in the "grey spaces" between grassroots initiatives and official planning structures, reinforcing their role in urban development through practice [Perry, 2019]. The rising importance of culture in urban regeneration has, in turn, elevated the role of creative intermediaries. However, few studies have demonstrated this relationship in small cities. Much of the existing research still focuses on large urban centres, where cultural and creative critical mass and revitalisation actions are concentrated. Understanding the role of creative intermediaries in smaller cities is crucial, particularly how they connect culture, economy, and political agency in regeneration processes.

Portugal and Latvia, although both EU member states, differ in terms of geography, economic development, and cultural policy traditions. Comparing them offers insight into how creative intermediaries operate across diverse European contexts and how such findings may inform EU-level cultural policy. The focus on Caldas da Rainha in Portugal and Cēsis in Latvia, two small cities outside major metropolitan areas, allows an exploration of intermediaries operating beyond dominant cultural hubs. Despite their size, both cities have active cultural scenes and creative potential. Portugal has a longer-established policy framework for CCI, while Latvia's sector has grown more rapidly in recent years. Both contexts utilize EU funding and policy tools to address local needs, illustrating how shared frameworks yield varied outcomes depending on the context.

This paper aims to answer how creative intermediaries contribute to creative entrepreneurship and urban regeneration in small cities. The main goal is to understand the role and positioning of creative intermediaries – their social profile and their positioning in the local cultural scene, in terms of the forms of action, motivations, social ethos and their relationships with local communities and institutions – and their power to foster CCE and the resonances of their action in the urban regeneration dynamics in small cities. The analysis is based on two case studies and a comparative methodology developed within the local context of the CCI.

From cultural to creative intermediaries

The concept of cultural intermediary has been discussed in sociological literature since Bourdieu [1979] described these actors as bridges between producers and consumers of cultural products. Over the past four decades, sectoral and societal changes have blurred the boundaries of intermediation, making it difficult to define the field of action clearly [Ferreira 2009]. According to Smith Maguire and Matthews [2012], two interpretations dominate: one focuses on a new middle class mediating production and consumption in line with Bourdieu [1984, 1996], while the other sees intermediaries as market actors positioned between culture and economy [Callon et al. 2002; Muniesa et al. 2007; Jakob and van Heur 2014]. Virani [2019: 5–6] describes cultural intermediaries as tastemakers who translate and give value to culture, including digital intermediaries such as crowdfunding platforms. As Smith Maguire and Matthews [2012] note, the concept invites reflection on agency, negotiation, and power. However, much academic work has tended to list intermediary roles without analysing the direction or complexity of their connections, whether between cultural producers, policy makers, or audiences. A study by O'Connor and Gu [2010] on Manchester's CCI reveals how intermediaries frequently struggle to connect public bodies and local actors, underscoring the importance of understanding the interplay between local histories, institutions, and socio-economic conditions.

Virani [2019] proposes a newer category: creative and cultural economy intermediaries. These individuals understand the broader cultural ecosystem and actively build working connections across its subfields. Their work fosters collaboration and community development while offering valuable insights for public policy. They act as local transmitters between key stakeholders, supporting the development of place-based creative economies. In this sense, the primary role of creative intermediaries is not taste-making, but facilitating connections within cultural and creative ecologies in urban contexts.

Several authors argue that cultural intermediaries can be either individuals or organisations [Smith Maguire and Matthews, 2012; De Propris and Mwaura, 2013; Taylor, 2015; Ekins et al., 2019]. Regarding creative intermediaries, despite the focus of Virani's perspective on individuals, we consider that organizations can also act in this capacity, since they establish and sustain the conditions for individuals to work. As noted by Naudin, Zemīte, and Hermane [2022], individuals are often embedded in local communities, acting as connectors, mentors, or cultural practitioners, while organisational forms, such as hubs or associations, structure activities, resources, and partnerships [Perry 2019; Haugsevje et al. 2021]. Although their scales and modes of operation differ, both types play complementary roles in linking policy, practice, and community within the cultural and creative economy. While individuals perform taste and legitimation work, such as curation, reviewing, and

public relations, organisations perform on a structural intermediation level, such as funding, programme design, and governance processes that shape the conditions under which individual intermediaries work [Smith Maguire and Matthews, 2012; De Propris and Mwaura, 2013; Taylor, 2015].

It is important to note a distinction: creative intermediaries are not self-interested, econo-centric cultural workers [Perry et al. 2015]. Naudin, Zemite, and Hermane [2022] argue that creative intermediaries are motivated by their passion for the CCI and their position within the wider local community. They are bridging and shaping connections. By being involved in a variety of projects and cultural activities, creative intermediaries can both restrict and broaden local CCI activities [Maguire, Matthews 2014], conducting the creative industries' value networks [Bilton 2017]. Intermediaries who mainly act as facilitators might be seen as active mediators in connections with local bureaucracy or policy levels [Haugsevje et al. 2021].

Creative intermediaries as enablers of creative entrepreneurship and urban regeneration

Creative intermediaries can be seen as agents of "future-making" creating new solutions and opportunities, strengthening cross-sectoral collaboration, and fostering cultural and creative entrepreneurship. While policymakers increasingly recognise the potential of CCI as a growth sector, their efforts may fall short due to a limited understanding of the sector's dynamics. Creative and cultural entrepreneurship is often identified as a key driver of CCI development. The CRISP project [Kunda, Tjarve, Eglīte 2021] notes that local CCI networks often remain closed, despite public efforts to encourage collaboration. Virani [2019] emphasises the importance of intermediaries who facilitate the flow of ideas, information, and access to broader networks. These individuals serve as key nodes in trans-organisational ecosystems, operating beyond their own organisational interests.

Urban development processes often reveal patterns of concentration and polarisation in cultural production, as well as in political, economic, and administrative spheres [Santos and Abreu 2000]. In this context, intermediaries take on various roles depending on their societal positioning [Ginzburg 1989], often acting as "gatekeepers" [Becker 1984] who enable cross-sectoral articulation between different professional domains [Madeira 1999]. In the last 30 years, culture has assumed a central role in urban regeneration, defining a new paradigm of urban [Bianchini 1995; Landry 2001; Scott 2001] and economic [Howkins 2001; Florida 2002] development associated with cultural and urban planning, and attraction and retention of creative human capital in cities. Although research is mainly focused on large cities, studies have corroborated the positive impacts of culture on small and medium-sized cities [Bianchini 1995; Bradley and Hall 2006; Breitbart and Stanton 2007; Evans and Foord 2006; Miles 2006]. Eventually, they contribute to the level of participatory

cultural practices that, in the long term, generate and feed participatory dynamics and governance in the city, fostering intersectoral articulations and cooperation between actors, and forming an inclusive framework for sustainable development [Ferreira and Duxbury 2017]. Their dynamics and actions benefit from the collaborative and sharing basis, among multiple agents, inherent to cultural activity embodied in formal and informal cooperation networks [Correia, Ferreira, Abreu 2017].

Methodology

This paper presents a comparative analysis of two case studies from Latvia and Portugal, focusing on the role of creative intermediaries in small cities in relation to creative entrepreneurship and urban regeneration. A multi-method ethnographic approach was applied, combining several qualitative methods.

Document analysis was used to understand institutional narratives, public discourse, and organisational practices. Aimee Grant [2018] highlights the value of documents in ethnographic studies, particularly in understanding literate societies and institutional behaviour. Reviewed materials included policy documents (*Cēsis Municipality Cultural Development Strategy 2030*), project reports (*Creative Industries in Small Towns: Potential and Contribution to Sustainability*), and internal documents from both hubs.

Site visits are a valuable qualitative method for observing the physical and social dynamics of a place. Lawrence, Keiser, and Levoie [2003] describe evaluative site visits as a method for collecting observational and experiential data to assess program implementation and outcomes. Fieldwork was conducted in both cities between 2021 and 2023, allowing for direct observation of the physical spaces, activities, and interactions within the hubs and their surrounding urban environments.

Semi-structured interviews allowed for in-depth exploration of stakeholder perspectives, while maintaining thematic consistency. Following the approaches of Bryman [2012] and Galletta [2013], interviews captured the views of hub managers, resident creatives, local policymakers (including the Vice-Mayor of Cēsis), and community partners.

Participant observation provided an immersive understanding of the hubs' everyday dynamics. Following Boccagni and Schrooten [2018], this method offered insight into informal relationships and lived practices. Researchers attended co-creation workshops, public events, and informal gatherings to understand the relational dimensions of creative intermediation.

This study adopts an analytical model that combines macro, meso, and micro-level perspectives to explore culture- and creativity-led urban regeneration in small cities. Based on the works of Comunian, Hracs, and England [2018], Munro [2017], and Jakob and van Heur [2014], the analysis is structured around three interconnected dimensions. See Table 1.

Table 1. Dimensions of the role of creative intermediaries

Micro level	Meso level	Macro level
Operational practices	**Networks, partnerships, and institutional positioning**	**Urban regeneration**
What activities and actions do they do? *training, skill-building for cultural and creative entrepreneurship, organisational management, financial sustainability*	How do they position themselves? *supporting the emergence of new intermediaries, strengthening collaboration, encouraging dialogue between creative actors and policymakers*	What kind of outputs are provided by their action? *contributions to social, cultural, economic, and environmental regeneration*

At the micro level, the focus is on the operational practices of creative intermediaries, including training, skill-building for cultural and creative entrepreneurship, and ensuring organisational sustainability through diverse funding sources such as public support, private investment, and EU programmes. The meso level examines how these intermediaries build networks, form partnerships, and position themselves within the local ecosystem. This includes supporting the emergence of new intermediaries, strengthening collaboration, and encouraging dialogue between creative actors and policymakers. Finally, at the macro level, the analysis considers the broader impact of these efforts on urban regeneration, looking at how creative activity contributes to social, cultural, economic, and environmental renewal. By connecting these levels, the model offers a comprehensive understanding of the role creative intermediaries play in shaping regeneration processes in smaller urban contexts.

Case studies

Skola6 is a creative hub and coworking space located in the small city of Cēsis, Latvia. Serving as a focal point for the creative industries, it primarily operates in product design, graphic design, and fashion design. In collaboration with the local municipality, Skola6 runs a design laboratory offering tailored business consultations in areas such as product development, business modelling, design, prototyping, and the use of emerging technologies. It also organises seminars and lectures on design thinking and business development, targeting NGOs, public institutions, and educational organisations to foster knowledge exchange and capacity building. Daily activities include coworking, consultations, and design lab services for local businesses and creatives. In partnership with Neredzīgo kvartāls, Skola6 is expanding to create a new creative quarter, increasing workspace availability for its residents. As part of the SOUP movement, it also contributes to community crowdfunding initiatives, highlighting its grassroots engagement. Skola6 collaborates on a European co-project

assessing the impact of community initiatives. In cooperation with the Cēsis City Council, the hub organises grant competitions for local entrepreneurs, offering financial support alongside expert consultations and project development. It also works with the Vidzeme Planning Region to establish an audiovisual studio, further strengthening support for local businesses. It actively supports collaboration across the creative and entrepreneurial sectors, encouraging the growth of its residents' ideas and businesses. In 2023, Skola6 supported around 57 creatives.

SILOS Contentor Criativo (Portugal) is a bottom-up creative hub located in Caldas da Rainha, Portugal. Established in 2010, in a former flour mill, it holds studios for artists and creatives, an event room and an exhibition gallery, providing affordable workspace and hosting a wide range of cultural, scientific, and entrepreneurial events. Its core functions are incubation and capacity building for the creative sector, support for the performing arts, strengthening of local commerce, and fostering community engagement. In 2023, the hub hosted 32 creatives in 27 studios. Therefore, SILOS undertakes several initiatives to support local creatives, especially those at the early stage of their careers—such as graduates of the Higher School Art and Design (ESAD.CR) – working as a starting point for their professional endeavours, often moving on to more specialized spaces or new opportunities as their careers progress. In December 2022, the Training School for Young Creators was launched, as a pilot project. A non-formal education program that aims to train young creators for the creative market by topics such as intellectual property, copyright, digital marketing, brand management or accounting. In terms of the management model, the hub is run by its founder and executive director Nicola Henriques as a business. Due to management and development constraints within the cultural sector, in 2013, a group of stakeholders created Destino Caldas, a nonprofit cultural association to support and expand SILOS activity. This has broadened the type of initiatives and funding instruments through a hybrid management model with a business and nonprofit framework ensuring the long-term sustainability of the hub.

Results and discussion

Building skills and sustaining organisations

At the micro level, the analysis focuses on the operational practices of creative intermediaries, including how they build skills and entrepreneurial capacities in local creative communities and ensure the financial sustainability of their organisations. The following subsections examine these two aspects: Training and skills for cultural and creative entrepreneurship (CCE) and Financial sustainability of creative hubs. Together, these practices provide the foundation for intermediaries to connect outward at the meso level.

Training and skills towards the direction of CCE

In the context of small cities, creative intermediaries operate through two interrelated dimensions – individuals and organizations, each contributing in distinct ways to the development of training and skills for CCE. The case studies of SILOS in Caldas da Rainha and Skola6 in Cēsis illustrate how these dimensions function in tandem to support local creative ecosystems. At the organizational level, both SILOS and Skola6 serve as institutional intermediaries that structure and deliver capacity-building initiatives. SILOS exemplifies a bottom-up, community-rooted model of creative intermediation. Its Training School for Young Creators pilot project reflects a sustained commitment to non-formal education. This initiative equips emerging creatives with essential entrepreneurial skills. Through strategic partnerships with incubators and other stakeholders, SILOS provides a comprehensive framework for professionalization and market readiness, particularly for early-career artists and creators.

Skola6, by contrast, operates within a more formalized and policy-aligned framework, closely linked to the strategic goals of the Cēsis City Council. Its collaboration with the organization "Design Elevator" and the implementation of the "Design Lab" program reflect a partnership-based approach to training. Skola6 offers masterclasses, seminars, and business consultations, and organizes an entrepreneurship contest for local schools. These activities are designed to foster entrepreneurial thinking among students and the broader community, with a particular emphasis on product design and business modelling. Unlike SILOS, Skola6 does not provide mentoring for broader entrepreneurial groups, as this role is assigned to the national Investment and Development Agency of Latvia.

While organizational structures provide the necessary infrastructure for training, individual creative intermediaries are essential in bringing these structures to life. At SILOS, the founder and executive director, along with mentors and facilitators, act as key enablers of knowledge transfer. Their embeddedness in the local creative scene allows them to identify emerging needs and tailor training programs accordingly. These individuals serve not only as educators but also as role models, bridging the gap between artistic practice and entrepreneurial engagement.

Similarly, at Skola6, individual intermediaries such as the hub manager and board members, many of whom are also active in local governance or education, act as connectors between policy, practice, and community. Their dual roles enable them to mediate between institutional priorities and grassroots needs, ensuring that training initiatives remain contextually relevant and inclusive. These individuals function as cultural translators, helping participants navigate the complexities of creative work, business development, and community engagement. Together, SILOS

and Skola6 demonstrate complementary approaches to CCE development. SILOS emphasizes deep, sustained engagement with creatives through long-term mentoring and capacity-building programs, while Skola6 adopts a broader outreach model that targets a wider audience, including students and community members. These distinct strategies highlight the value of both organizational infrastructure and individual agency in fostering resilient and adaptive creative ecosystems in small urban contexts.

Financial sustainability of the organisation

The financial sustainability of creative hubs in small cities depends not only on institutional design but also on the strategic actions and relational capacities of the individuals who bring these structures to life. In the cases of SILOS and Skola6, both organizational and individual creative intermediaries play essential roles in securing and managing diverse funding streams, aligning with local development agendas, and navigating the challenges of long-term viability.

At the organizational level, SILOS operates through a hybrid management model that combines business and non-profit frameworks. This allows the hub to diversify its revenue sources, including studio and event space rentals, ticketed events, municipal support, and competitive project funding. The organizational model reflects a bottom-up approach, rooted in the local creative community and responsive to its evolving needs. SILOS's close partnership with the Municipality of Caldas da Rainha further enhances its strategic positioning, allowing it to align its activities with broader territorial development goals while maintaining operational autonomy. This dual orientation – community-driven yet institutionally connected – positions SILOS as a flexible and resilient intermediary capable of adapting to shifting funding landscapes.

Skola6, by contrast, exemplifies a mixed funding model that integrates public and private resources. As both a municipal institution and a non-governmental organization, Skola6 is uniquely positioned to access a wide range of funding opportunities, including subsidies from the Cēsis City Council, income from coworking space rentals and consultations, and EU project funding. This dual status enables the organization to serve as a formal intermediary within the city's strategic plan for creative industries, while also maintaining the agility of a grassroots initiative. However, Skola6 also faces structural challenges, particularly related to the renovation of its premises, which are protected as architectural heritage. The financial and regulatory demands of maintaining such a space highlight the complexities of sustaining creative infrastructure in small urban contexts. While organizational frameworks provide the scaffolding for financial sustainability, individual creative intermediaries play a crucial role in operationalizing these models. At SILOS, the founder and executive director plays a central role in securing funding, managing

partnerships, and articulating the hub's vision in ways that resonate with funders and policymakers. This individual leadership is critical in navigating the bureaucratic and relational dimensions of funding acquisition, particularly in competitive or fragmented cultural policy environments.

Similarly, at Skola6, individual actors such as the hub manager and board members, many of whom hold positions in local government or cultural institutions, serve as key brokers between the organization and its funding ecosystem. Their involvement in both civic and creative networks enables them to advocate for the hub's interests, identify funding opportunities, and ensure alignment with municipal and regional development strategies. The long-term financial planning initiative, launched in 2013, aimed to reduce dependency on municipal support, reflecting a proactive and strategic orientation often driven by individual vision and leadership. The interplay between organizational design and individual agency shapes the financial sustainability of SILOS and Skola6. While both hubs benefit from municipal support, their approaches differ in terms of autonomy, integration, and strategic orientation. SILOS maintains a more independent, community-led model that complements municipal goals, whereas Skola6 is more directly embedded within local governance structures.

In both hubs, financial sustainability results from the interplay between institutional structure and personal agency. SILOS maintains a more autonomous, community-led model that complements public objectives, while Skola6 is more embedded within local governance frameworks. In each case, the effectiveness of financial strategies depends not only on access to funding but on the ability of intermediaries to activate and align resources in support of creative ecosystems. Creative intermediaries play a crucial role in the sustainability of creative organisations, particularly in small urban areas where institutional support and market opportunities are often limited [Eglīte and Kalēja 2024]. Their deep integration into local networks enables them to identify emerging needs, interpret policy frameworks, and foster trust among stakeholders. In doing so, they not only ensure the operational continuity of creative hubs but also influence their developmental paths, whether through launching training programmes, securing funding, or advocating for inclusive cultural policies.

Networking, partnerships, and positioning of the organisation

At the meso level, the emphasis shifts from internal practices to the outward-facing role of creative intermediaries in building networks and partnerships. This level highlights how intermediaries establish their institutional positioning, mediate between different actors, and strengthen cross-sectoral ties within local and regional ecosystems. As creative intermediaries increasingly position themselves as key agents within the cultural and creative ecosystems of small cities, their influence extends

beyond individual initiatives to shape broader urban and institutional dynamics. At the meso and macro levels, their roles in fostering networks, building partnerships, and mediating between diverse stakeholders, including policymakers, educational institutions, and local communities, become critical levers for systemic change. This section examines the anticipated outcomes of such intermediation, specifically how these actors contribute to the emergence of new intermediaries, the expansion of collaborative networks, and the strengthening of cross-sectoral ties. By examining the positioning and strategic engagement of creative hubs like SILOS and Skola6, we gain insight into how creative intermediaries not only support entrepreneurship and innovation but also catalyse socially embedded and policy-relevant inclusive urban regeneration processes.

In Portugal, SILOS maintains a strategic partnership with the Municipality of Caldas da Rainha and the Higher School of Arts and Design (ESAD.CR). It collaborates with local and national cultural organisations, tourism entrepreneurs, creative tourism initiatives, incubators, and universities engaged in research and development. SILOS plays a pivotal role in connecting local authorities, institutions, and communities through networking and collaborative approaches. In Latvia, the city of Cēsis aims to foster and sustain networks between the City Council and the local community. Skola6 plays a crucial role in executing this strategy. As a creative intermediary, Skola6 not only facilitates connections between policy-makers, the City Council, and the local community but also encourages its residents to adopt similar roles. It actively identifies local individuals who can act as creative intermediaries, cataloguing their skills and areas of expertise in a shared document accessible to those seeking partners for creative or business ventures.

The leadership of Skola6 embodies this mediating role. Its manager, Amanda Strigele, is an active creative intermediary, as are board members Jānis Ķīnasts, founder of Cēsis Pluriversity, and Dace Eihenbauma, manager of the Development Department in the Cēsis City Council. Other key supporters include the artist residence "Rucka", and Atis Egliņš - Eglītis, the head of the City Administration, who actively supports Skola6 and the broader creative development of Cēsis.

Skola6 also extends its network beyond Cēsis. It collaborates with the European Creative Hubs Network and partners with the Latvian governmental organization, the Investment and Development Agency of Latvia (LIAA), and its Creative Industries Incubator in Riga. The hub emphasizes the importance of informal networks and communication by organizing community-building activities such as resident breakfasts, film evenings, and social events.

SILOS primarily provides workspaces and nurtures creativity for artists in the early stages of their careers. Its close relationship with ESAD.CR and its role in urban and territorial regeneration underscore its focus on attracting and retaining

young talent and revitalizing urban spaces. In contrast, Skola6 operates as a creative hub and coworking space with a broader scope, encompassing product, graphic, and fashion design. It emphasizes business consultations and design thinking while serving as a strategic executor of Cēsis City Council's creative policies. The hub benefits from municipal co-funding and focuses on bridging the gap between the policy-making and creative sectors. While SILOS exemplifies a bottom-up approach with a focus on local creators' community development and culture-led urban regeneration, Skola6 adopts a more structured approach aligned with local government strategies and the broader creative industries.

Both hubs rely heavily on networking, using informal events to connect policy-makers, creative professionals, and the community. SILOS fosters community and institutional ties, whereas Skola6 employs a combination of formal and informal strategies to mediate between diverse stakeholders, reflecting their respective organizational objectives and contexts.

Culture and urban regeneration

At the macro level, the analysis addresses the broader impacts of creative intermediaries on small-city regeneration, including their contributions to social, cultural, economic, and environmental revitalization. The activities carried out by SILOS consistently integrate social, cultural, and economic dimensions. Their primary objectives include strengthening the local community through activation and engagement in various projects and activities, fostering and promoting cultural and artistic endeavours by supporting local artists and creators, revitalizing and bolstering local commerce to ensure the survival and sustainability of the creative community market, and promoting culture-based and creative tourism experiences within the city. From an environmental perspective, SILOS prioritizes urban regeneration through the renovation of abandoned or underutilized buildings, the revitalization and appropriation of public spaces, the restoration and cultivation of green spaces in the city, and the promotion of sustainable daily practices, including reducing, reusing, and recycling.

Socially, Skola6, in collaboration with the art space "Mala" and the association "Be the Light," supports community well-being through initiatives such as a community fridge. This project enables local residents to donate surplus food, which can then be made available to those in need. The SOUP project, with its local crowdfunding activities, is recognized as a significant effort toward social regeneration. Culturally, Skola6 raises awareness about the local creative industries and their contribution to community well-being by organizing creative film evenings, cultural events, and masterclasses. Economically, it plays a key role in educating and empowering local creative entrepreneurs, co-organizing local grant competitions

for business initiatives, and collaborating with the Investment and Development Agency of Latvia. The residents of Skola6 are not only economically active but also contribute to the local economy by creating businesses, generating profit, and paying taxes, positioning themselves as creative business professionals rather than charity organizations.

Environmentally, Skola6, in cooperation with board member Jānis Ķīnasts organizes Cēsis Pluriversity, a project focused on local regeneration and environmental sustainability. This initiative also serves as a local representative of the New European Bauhaus movement, highlighting innovative and sustainable approaches to community development. By surfacing infrastructural inequalities, such as heritage renovation constraints at Skola6 and access limitations at SILOS, this study further contributes to critiques of the "creative city" paradigm [Jayne et al., 2010; García, 2005]. It highlights the limitations of scaling such models without considering the socio-material conditions of smaller cities.

While SILOS is characterized by its emphasis on building renovation, such as transforming a segment of an old flour mill into a thriving creative hub, promoting cultural and creative tourism, and dynamizing local commerce and public space with activities such as the "Bazar à Noite" creative market, Skola6 adopts a more community-centred approach to regeneration. This is evident in its initiatives, such as the community fridge, the SOUP crowdfunding project for local initiatives, and the promotion of environmental education through Cēsis Pluriversity. SILOS primarily focuses on urban renewal and cultural events, whereas Skola6 integrates social and environmental initiatives into its urban regeneration efforts. This research complements Munro's [2017] findings on soft skills and intermediary support structures in the creative economy. SILOS and Skola6 serve as grounded examples of localised, non-formal education that foster entrepreneurial capability, social cohesion, and civic innovation.

Conclusions

This research helps to fill existing gaps in the literature by contributing new empirical evidence on creative intermediaries in small-city contexts. At the same time, it reinforces and expands several established strands of scholarly work on cultural and creative intermediaries. The strategic role of intermediaries, as outlined by Virani [2019] and Jakob and van Heur [2014], is evident in both case studies, where SILOS and Skola6 function not only as infrastructure providers but also as civic translators and community connectors. This supports Smith Maguire and Matthews' [2012] argument that intermediaries act as agents of negotiation and power, mediating between cultural production and urban transformation. The comparison between SILOS and Skola6 highlights the role of creative intermediaries as pivotal agents for

urban change, showcasing how these organizations foster regeneration and create new opportunities for the cultural and creative economy (CCE) through distinct approaches. SILOS exemplifies infrastructure renovation by transforming part of an old flour mill into a creative hub, focusing on urban regeneration and promoting cultural tourism. In contrast, Skola6 adopts a more community-centred approach, integrating social and environmental initiatives such as the community fridge, SOUP crowdfunding for local projects, and environmental education via Cēsis Pluriversity.

Moreover, the empirical evidence from Skola6 and SILOS deepens the analytical framework proposed by Comunian, Hracs, and England [2018], who emphasize a multilevel approach to understanding intermediaries. By applying their micro–meso–macro lens in small-city contexts, this study demonstrates how local intermediaries act across institutional layers – embedding themselves in community networks (micro), building cross-sector alliances (meso), and aligning their missions with broader regeneration goals (macro). Perry [2019] states that local cultural bodies and intermediaries cement their role in urban regeneration beyond top-down policies since they work within "grey spaces" between grassroots and official planning, translating culture into forms of community engagement, value creation, and urban innovation. Although both hubs benefit from municipal funding, they differ in their relationship with local governance. Skola6 is closely aligned with the strategic objectives of the Cēsis City Council, implementing its creative industry policies directly. SILOS, by contrast, retains a more autonomous, bottom-up structure that complements public policy without being dependent on it. Despite these differences, both organisations face challenges related to their activities, sectoral needs, and long-term sustainability. SILOS focuses on intellectual property, branding, and market readiness through its Training School for Young Creators, while also strengthening the local economy and public space through community-building and its "Bazar à Noite" creative market. Skola6 places greater emphasis on local entrepreneurship, product design, and educational initiatives aimed at a broader community.

These distinct yet complementary approaches underscore their shared reliance on networking and collaboration, as both organizations use informal and formal events to connect policymakers, creative professionals, and local stakeholders. SILOS builds community and institutional ties, while Skola6 mediates between diverse groups to bridge gaps and align with broader government strategies, illustrating different but effective methods of supporting creativity and innovation. Together, these findings provide a model for analysing creative intermediaries across Europe, identifying their similarities and differences to inform policy and decision-making at both national and European levels, ultimately highlighting their critical role in shaping vibrant and sustainable creative ecosystems.

Acknowledgment

The contributions of PhD candidate Tiago Vinagre de Castro were written under his research project *"INTERMEDIA – Cultural intermediaries in urban regeneration in small cities"* (2020.08826.BD), funded by the Portuguese Foundation for Science and Technology (FCT).

The contributions of Dr.oec. Ieva Zemīte and PhD candidate Žanete Eglīte were written within the scope of the project "Rethinking Creative Cities: Networks, Intermediaries, Development Prospects/ REPRINT" (No. lzp-2021/1-0588), funded by the Latvian Council of Science.

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TOWARDS CONSTRUCTIVE INTERACTION IN CONTEMPORARY ART: ARTISTS' AND CURATORS' PRACTICES AND EXPERIENCES

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Abstract

In the second half of 2024, within the framework of the project *Spatial and Visual-Conceptual Strategies of Artworks in Contemporary Art Exhibition Development of Scientific Activity at the Latvian Academy of Culture*, a group of researchers conducted a focused study on the spatial and visual-conceptual strategies of artworks. In total, 20 in-depth, semi-structured interviews were conducted. The process of interviewing artists and curators highlighted an observed issue – the audience's inability to fully comprehend the idea of an artwork, both during its creation and exhibition.

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.568

ISSN 2500-9974

CULTURE CROSSROADS

The objective of the paper is to analyse the data obtained from the interviews in order to identify the methods employed by artists and curators to develop constructive interaction during the creation and exposition of the artwork. Findings emphasise several core themes that shape constructive interaction in contemporary art. One of the factors affecting audience engagement is the expectation of a single, fixed meaning in artworks, whereas artists encourage multiple interpretations. The role of mediation, through exhibition texts and contextual information, proves essential in bridging the gap between artists and audiences. Additionally, exhibition dramaturgy plays a crucial role in shaping interaction. Spatial arrangements can either invite immersion or create barriers to engagement. Moreover, some artists view contemporary art as a social and emotional dialogue, where they hope their work will not only be seen but also provoke reflection and discussion. Findings indicate that accessibility plays a crucial role in this process, with artists and curators using various mediation strategies, such as guided explanations, complementary texts, and spatial design – to engage audiences effectively.

This paper will examine the experiences of artists and curators working in the contemporary art scene in Latvia over the past three years, focusing on the interpretive challenges identified in interviews. While insights from these perspectives highlight challenges and strategies for constructive interactions, further exploration of the viewer's role in interpreting art is essential.

Keywords: *contemporary art, artists, constructive interaction, curators*

Introduction

In the moments when the experience of art has to be stopped or even abandoned due to not comprehending its content or technical execution, there is a possibility that a constructive interaction has not occurred. Between the viewer and the artwork, a two-way communication process occurs in which the viewer's personal experiences, emotions, and interpretations influence their understanding and engagement with the artwork and its experience. This also applies to the process where the viewer directly engages with the artwork, affecting or altering its meaning or form [Bishop 2012; Dewey 1934]. Underlying the artwork are specific intentions and decisions made by the artist and curator, a perspective that serves as the focus of this research. Interaction is a complex concept that can be viewed from a philosophical perspective. For instance, Maurice Merleau-Ponty suggests that our understanding of the world is fundamentally based on our lived experiences and our bodily interactions with it. This perspective is essential for grasping how we experience art; it is not merely visual or intellectual but is deeply embodied [Merleau-Ponty 1945]. This embodied

dimension of perception aligns closely with ideas of affect theory that highlight how art can generate immediate sensations and feelings that precede reflective emotional responses; they are deeply embodied and can possibly be not easily articulated. Affective experiences in art operate through visceral, embodied sensations that precede language, narrative, or representation [Susan Best 2011: 47–48]. In this context, interaction with art can occur even without full comprehension, as emotional resonance can act as a bridge between the artwork and the viewer. Viewing interaction from a sociological standpoint, authors such as Erving Goffman and George Herbert Mead position it in relation to the mutual presence and reflective processes of the mind. Goffman describes interaction as a set of events that occur during co-presence and by virtue of co-presence [Goffman 1967: 4–6]. Arguing that interaction necessitates a state of uninterrupted mutual presence between the subjects. Furthermore, G. H. Mead interprets interaction from a behavioural psychology perspective, regarding processes of the mind and stimuli-response relations. Mead believes that within the process of interaction, the mind executes a series of reflective actions, identifying and analysing various characters of the object or situation in order to produce a response [Mead 1934]. As hierarchical structures are a part of interacting with art, especially in contemporary spaces, it is necessary to inspect the relationship between curator, viewer, accessibility and freedom of interpretation. Jacques Ranciere's (Jacques Rancière) theory of intellectual emancipation redefines the process of learning as interpretation, comparison and construction of meanings that can deviate from artist's original intentions. This theory opposes the view that understanding has to be given by an authority – it has to come by consciously engaging with art, co-constructing and investigating its meanings [Ranciere 2008: 8–10].

This paper does not examine the theoretical concept of interaction but is instead grounded in practical experience; however, when exploring interaction in contemporary art, it is significant to emphasise the various dimensions of interaction and the practices of *producing* interaction.

Therefore, the concept "constructive" refers not only to the formed targeted strategies during the creation of the artwork but also during the exposition process as a way to effectively reach, address and engage the art piece's perceiver.

Methodology

Within the framework of this research, qualitative methodology was employed. Qualitative methodology allows the researcher to gain a broader understanding of matters concerning the cause and reason of individual attitudes on the objective of the research, as well as explaining the cause-and-effect relations of certain behaviours and actions [Tümen-Akyıldız 2021]. In this study, the use of qualitative methodology provided an analytical insight into the meaning and diverse interpretations of space

and spatiality within the Latvian contemporary art scene. In order to comprehend these questions and employ them within the local context, 20 in-depth, semi-structured interviews were conducted featuring various local professionals: managers of institutions and galleries, artists, and curators, representing various sectors such as the private, non-government and public. To ensure the collection of the most eminent yet representative data, participation in contemporary art exhibitions within Riga over the past three years was emphasised as an important criterion for respondent selection. Thus, providing an insightful approach to the utilisation and significance of space and spatiality within Latvian contemporary art exhibitions. A similar approach was employed regarding the development of in-depth, semi-structured interview guidelines. These guidelines incorporated various theoretical concepts such as *site-specific art* and *junk-spaces*, as well as addressed the individual practices of respondents, including their overall professional experience and the contemporary art projects they have participated in over the past three years in Riga. Subsequently, the interviews were transcribed to carry out thematic data analysis. The data was divided and gathered into thematic categories, evaluating the data in relation to the initial research objective – to investigate the meaning of visual and conceptual strategies of space within creating and exhibiting works of contemporary art. However, during the interviews, an additional theme emerged: interaction. The following text explores this theme in more detail, analysing various types of interaction divided into seven distinct categories.

Accessibility of content

Ensuring the accessibility to art-related information is crucial for a diverse audience with varying levels of perception and understanding to be able to fully engage with the exhibition. Most often, it includes the presence of complimentary texts, navigation signs and the use of simplified language. Those are some of the main tools for promoting the understanding of art, and the information available can promote involvement in art. By not demoting anyone but removing unnecessary complications and bridging the gap between art and audience so that the exhibition can create more curiosity, not confusion.

As contemporary art is known for introducing unfamiliar forms of art and challenging well-established social and political discourses [Kakarla 2024], it is important to emphasise the development of communication models that could elaborate on the practices and themes within contemporary art in a comprehensive way. The use of various approaches can be observed when communicating with the audience of the exhibition mentioned above. However, at times, these approaches may be disregarded as complicated, as these points of interaction can be saturated

with unheard terms and concepts. Therefore, the use or new combinations of various communication strategies could be considered when communicating with visitors.

Freedom of interpretation

It is evident that, on the one hand, the visitor must be given freedom of interpretation but at the same time, there is a desire for more direct instructions such as previously mentioned complimentary texts, navigation signs and simplified language use.

It is important to allow a person to have their own experience, where there is no fear of right or wrong. The accessibility of the content is the one which can encourage people who are not familiar with it to experience art, and, for example, the complimentary texts should not indicate the rightness or wrongness of things, or what exactly the artist has in mind. "That you have a reason to see what you see or experience what you experience. That's good enough. I like that it sets something in motion or prompts something new and perhaps creates potential. That's what an exhibition is supposed to do. And it's not about: "The artist wants you to see it, and if you don't see it, then you're wrong"." [LKA-T-16-5]

There should be opportunities and a desire to be knowledgeable about accessibility and its needs, to learn about it so that the information is accessible and understandable to everyone who enters. "When you know that such accessibility exists, not only in a physical space but also in the availability of content, when you are aware of it, then more attention is paid to it, looking for other exhibitions and good examples, also bad ones." [LKA-T-9-4]

After the interviews, a relatively opposite strategy also emerges, in which the curator himself chooses a deliberate path, giving the visitor complete freedom of interpretation without including many explanatory texts: "I very deliberately did not want to put the descriptions of the works or the names of the artists on the wall in the exhibition and also, let's say, not to write some kind of curator's text that long and wide (...) wanted to leave it all up to people. It seemed that many things were quite straightforward to read or understand, and the lesson was – in fact, that no! People really like that many things are told (...) what you should pay attention to and what you should not pay attention to." [LKA-T-6-5] The need for specific instructions expressed by the viewers could be read as a desire to return to a more hierarchical learning process, where the student learns from the teacher, and the viewer, as a spectator, is rendered passive. However, J. Ranciere describes the spectator as an active participant, because the spectator interprets, compares, and constructs meaning in ways that go beyond the artist's intentions. He calls this active process emancipation in art, which challenges the assumption that learning can only come from an expert [Ranciere 2008: 8–10]. The ideas expressed by artists

and curators complement this view, which seeks to empower viewers to engage with art on their own terms and to co-construct meaning together.

Since the perception and experience in the space can depend not only on the level of preparation and previous experience of the visitor but also on the type of art, content and structure of the exhibition itself, text interpretation, instructions, and explanations may be regarded as a choice rather than a mandatory rule. Offering an explanation of more in-depth content but giving the opportunity to stay with the simple, in addition, increasing confidence in one's own perception and emotional path, in which there is no single correct interpretation. Leaving room for both deeper contextual understanding and intuitive experience. In order to not limit what concerns the complimentary texts, open-ended questions and including neutral explanations of the topics could be considered, leaving room for different opinions and validating different viewpoints. Since the experience is shaped by a set of knowledge and emotions, accessibility tools could not be mandatory but rather encouraging and empowering. Also, taking into account the fact that each of the visitors perceives new information and creates experience differently – one emotionally and sensorial, the other conceptually. A good way to create a pleasant experience would be to create a discussion, giving space for reflection. Art itself includes an open experience for everyone, and simplified language can be not only a good way to perceive content for different groups of society but also can encourage curiosity, making the exhibition a comfortable place to explore.

New forms, not only in the layout and design of the exhibition but also in the form and method of communication, allows to experience the exhibition and space in an even more accessible way. Freedom of interpretation is one of them. Mediators can play a significant role in ensuring freedom of interpretation, allowing visitors to feel welcome and free. This can happen when faced with a friendly and knowledgeable mediator. It is important to create a conversation where different opinions and feelings are allowed. It should also be understood that not everyone can use the conversation as a form of engagement or reflection. It is important to allow the visitor to choose their own way of engaging in the creation of the experience of the space and art.

The role of art mediation

In recent years, mediators have held an increasingly important role in contemporary art exhibitions and how they are understood and received by viewers. It is seen as a reflective tool and a more personalised approach to general art communication. Art mediators tend to communicate various ideas and concepts to visitors through mutual discussion by drawing parallels to notable events, personal experiences, or ideas. Such practice provides a connection between the visitor, the artwork, and

the mediator and, therefore, provides a more pleasant experience. Similar to simplified language texts, mediation is a tool of choice and can be educational, often serving as an extensive tool – a means of reaching a diverse audience. Mediation can also bridge the gap between art and visitors of different occupations who possess different levels of knowledge, for instance, about art-specific terminology or the general forms of expression within contemporary art. "There are probably two types of visitors – professionals, those who already know what they are coming for, everything is clear to them quickly – there is only one way to communicate with them. The second visitor is the "ordinary person" who is not an art professional." [LKA-T-9-10]

Therefore, the art mediator takes the role of a *translator* elaborating on a variety of topics to different types of exhibition visitors, occupying a significant function within art communication.

> "(...) both with the program of mediators and with the explanatory work, we give an approximate path and let them go along that path. Approaches are different, whether you completely leave the viewer on a sort of autonomous trajectory or try to guide them somewhere. It is also spatial, whether you try to direct them somewhere with some signs or tell that this is how it is and figure out how to deal with it by yourself." [LKA-T-8-3]

Here, it is important to understand not only the importance of mediators as such, but also to invest time and resources in what this mediator becomes. Adequately allocating both financial support and time to introduce the mediator to everything necessary. "If the mediator is knowledgeable and if he knows specifically, and maybe also something a little more. It is very valuable and very good." [LKA-T-9-12]

The attitude and desire to have a qualitative conversation with the visitor depends not only on the mediators themselves but also on the space and how much the mediator has been connected to this space and people: "Question – has there been time for mediator training, has the artist of the specific exhibition been present, or has there been an opportunity to meet. Sometimes I have heard that there are mediators who speak a bit of nonsense or their own interpretation." [LKA-T-9-11]

It is equally important to give mediators the opportunity to participate in the creation of the exhibition, being in close contact with it from the very beginning, thus not becoming only interpreters of the exhibition concept, creating a sense of belonging to the space. Also, creating a more natural dialogue between the place, the visitor, and the mediator: "(...) include the mediators in the installation process, give them ownership, as if for the exhibition, and this also applies to the space, so that they also feel that they belong to this space, that they are part of this space and represent not only the space but also themselves in it." [LKA-T-16-6] The aforementioned idea of the mediator as interpreter and translator, and as someone

who invites discussion, complements the concept of emancipation [Ranciere 2008: 14], where the mediator is not an authoritative guide, but encourages interpretation, discussion, and the generation of meaning.

The synergy of space and art

Within the interviews conducted various opinions of art professionals can be observed, with only the few admitting that interaction is not highlighted when creating or exhibiting artworks. The majority of respondents believe that interaction is one of the core elements of an artwork or an exhibition, and that factors such as the viewers movement throughout the exhibition space, their feelings and responses are crucial in the creation of a well-arranged exhibition. Factors such as what the viewer first observes when entering the exhibition space and what will be the last object they see, pose a significant question in the realm of interaction with art – how will the visitor view? Furthermore, scholars highlight relevant objects, such as the first or the last object within an exhibition, and their momentary sense, and significance, emerging within a complex negotiation, through which the viewers become at times instantly aligned towards a specific exhibit or an object, emphasising the relevance of the primary and final points of interaction with the artworks [Scott, Hinton-Smith, Harma, Broome 2013: 3]. One respondent formulated the combination of these aspects as *the dramaturgy of viewing*, which combines the scenography of a space, cohesiveness between the space, the viewer, and the artwork, and the factors mentioned above, such as the route of the viewer or the primary and final moments of interaction. The exhibition space can be interpreted as a peculiar playground in the context of interaction. With the interdependent nature of these factors shaping one another within the one variable – the unity between the exhibition space and the artwork.

Incorporating the viewer within the synergy of space and art is a means of identifying the various interaction aspects that take place while experiencing the exhibition or a singular artwork. Synergy refers to the combined power that results when different elements work together, granting that their sum is greater than its parts [Cambridge Dictionary 2023]. When questioned about the viewers interaction with artworks, the respondents emphasised hospitality and the cohesion of the exhibition space and artworks. They positioned both aspects as equally important in order to enhance the exhibition experience.

The hospitality of an exhibition deals with not only physical comfort but also factors that form parallels with accessibility, whether it would be the means of lighting the exhibition or the readability of complementary texts. Nevertheless, multiple respondents believe that in many cases the physical comfort offered at the exhibition space is a crucial factor that can enhance the viewer's experience. As stated by a local

installation artist: "I think hospitality is always sought after, so the viewer can feel at home. There are always places to sit down and designated zones for the visitors. It's not like you view the artwork and scroll further, I think it's wonderful to sit down and spend some more time with the artwork." [LKA-T-11-2]

This emphasises that certain aspects of hospitality are placed with the intention of benefiting all visitors, in order to connect with the artwork on a deeper level and enjoy physical comfort at once. As stated further by the same artist: "The exhibition in some way should be a form of leisure, a place where one comes to think. A place where you don't exhaust your body, in order to employ your brain." [LKA-T-11-2]

Therefore, an exhibition space should strive to construct a physically comfortable experience for the visitor, to ensure a connection between the viewer and the artwork on a cognitive as well as a physical level, constructing a mutual presence, as an aesthetic experience necessitates continuous interaction between a being and art [Penfold 2017]. Furthermore, artists tend to focus on how their artwork could or should be observed, experienced, or what type of experience it should deliver to the viewer. With this combination, another dimension of composition can be formed, that interprets the artwork as an element of the exhibition space, an element of the visitor's experience. This composition covers the physical comfort, routes, and points of interaction of the viewer, including the cohesion of the artwork and its inhabited environment.

Artists employ various approaches to construct a cohesive environment between the artwork and the exhibition space. The dominant opinion among respondents was that the artist should always think of ways in which the exhibition space could enhance the artwork, emphasising that if this collaboration with the space is not established, it may harm the presentation of the artwork, for example, ineffectual placement within the space, giving a sense of an alienated object. Working and attempting to adjust the artwork to the space instead of adjusting the space for the artworks, is a common practice when exhibiting art outside of spaces that are designated for art e.g. white cube spaces, however this practice can be observed within the conventional spaces for exhibitions. When working at an *off-space* or on a *site-specific work*, artists tend to consider various factors, such as the architecture of the space, to ensure mutual unity. As stated by an independent choreographer and visual artist: "(...) we tried to use the natural architecture of the room as a means of unifying the installation and the space, to ensure that the installation doesn't feel like a foreign body." [LKA-T-1-1]

The artwork and space have interdependent relations which tend to fulfil one another's contexts and ideas, enhancing the visitors experience by presenting a unified environment or a *parallel world*. As stated further by the choreographer and artist: "The installation felt like it had been there for some time and, for the viewer, it

seemed like a world that simply exists, that no foreign body has been placed and afterwards would be transferred somewhere else, but that it inhabits this little world." [LKA-T-1-1]

Emphasising the creation of an alternate environment, the respondents believe that cohesion and various scenographic solutions should be employed in order to ensure a well-made exhibition experience.

The scenography of space

In conducted interviews, respondents describe scenography of space as something that deals with the general setting of the space, regarding the layout, lighting, complementary visual objects and other factors that create the general outlook of an exhibition. However, some respondents see the scenographic opportunities as a means of experience production, as a tool that manifests various cognitive spaces (e.g., visual, audial, cultural) into one setting [LKA-T-14-1; LKA-T-4-1]. Although scenography predominantly involves considerations of visitor circulation and the display of artworks, particular scenographic practice brings a distinct approach to these activities. At times, approaches in exhibition scenography aim to create spatial conditions in order to produce a space within which visitor movements and interaction with art objects are performative events. Furthermore, scenography practice in contemporary art exhibitions can employ other senses, stretching beyond spatial composition and artwork-focused scenography, by creating "aesthetic atmospheres", which can include audial and olfactory elements [Thornett, Crawley 2022: 4–5]. Within the conducted interviews, respondents mentioned various aspects of a certain place that they employ, in order to work with the given space of the exhibition. These factors generally focus on the daily function and historical contexts of the space and/or the creation of an alternate setting within the space.

When employing various contexts, artists tend to work within the given scenographic framework that the particular space has to offer. This framework can be either limiting or complimentary to the artistic concept for an artwork. As a local artist stated in the context of exhibiting art in an office building: "It was important for me that the given space is somewhat ordinary and everyday-like. But at the same time, I needed it to be freed from some additional imprints, (...), therefore, adjusting to this particular room needed change and additional planning on how we can fulfil the idea without making noticeable changes to the artistic concept." [LKA-T-1-2]

Implying that exhibiting in a place with a strong presence of the daily function (e.g., an office) can be challenging and contradict the artistic concept of an exhibition; however, at times exhibiting in such places can be fulfilling to the artwork. Making the historical or daily context of a particular place an important factor when working with scenographic solutions. As stated further by the same artist: "It depends on

whether we want to look at the place from the same viewpoint. We either highlight this daily context, or opt to create a different experience, which usually is foreseen on a daily basis, such as a historical imprint, or the historical context, (...) it's like having a conversation with the space, within the given place." [LKA-T-1-10]

The contextual landscape of space can give various scenographic opportunities with options to either employ and highlight the historical or daily contexts within the artistic concept, or to dim them and strive to create an alternate space autonomous from the context.

When creating an alternate space within a room or building, artists and curators tend to create a space that is at once an artwork, a scenographic solution, and a physical/instinctive experience for the visitor. By employing various approaches, the room can be at times dematerialised and made seemingly more dynamic. As mentioned by a multidisciplinary artist, scenographer, and art critic: "I've had many projects where I've created a space within a space directly. These works aren't necessarily visual, you can walk through them, they should be felt with the body, by creating routes through which the visitor can move around the space with different obstacles. (...) or the feeling that the space around you is moving, I've had many exhibitions with textile walls." [LKA-T-13-1]

Emphasising that creating an autonomous space within a room can be an approach for constructing a dynamic, dematerialised space and, therefore, creating an alternate experience for the visitor of the exhibition. Such practice can also make the artistic concept less dependent on the given space of exhibition, by creating a contextually free space, which the artwork inhabits.

Art in public spaces

Unlike works in galleries and museums, public art requires a unique form of interaction, as it is set apart by its accessibility and exposure. As artists often point out, galleries and museums provide a relatively controlled and predictable environment. This is especially evident in the art galleries of Riga, as they are quite small and attract a familiar and somewhat predictable audience – people who regularly visit exhibitions, attend openings and engage with the art world. However, in a public setting, the audience is much more diverse and unexpected.

Consequently, artists and curators emphasise the necessity of more close and intentional communication with society and the specific community. Public art raises various important questions: How does the work affect those who see it? Is it creating an unnecessary disturbance, or does it provide meaningful engagement? As mentioned by one respondent: "It is clear that art can comment on violence, but it must never become violent towards others, the environment or people." [LKA-T-1-11] The everyday traditions of the people inhabiting this public space must be considered.

One respondent illustrates this by highlighting the potential impact on an individual's routine: "Maybe he [a regular person] always sits here on that bench, and you come here with your stupid artwork and ruin some of his daily rituals." [LKA-T-17-5] This emphasises the need to work with the community in order to respect their interests and also to promote a sense of belonging to the specific space. Thus, responsibility emerges as a crucial keyword in the discussion of public art: "In public spaces, one must be especially careful and responsible. I believe responsibility is the key word because we are engaging with a broad audience – one that did not necessarily expect to encounter this work of art. A work of art can have a profound impact: it can educate, nurture, and inspire society. Ideally, when such a work is being created, the local community is taken into account. The best and most meaningful artworks are usually those that consider the community's interests from the outset, allowing them to blend organically into the environment. When this happens, people not only appreciate the artwork but also feel a sense of connection to it." [LKA-T-8-1] Many believe in public art as a tool for creating participatory citizenship, increasing socio-political engagement, fostering a sense of community, and promoting local identity. [Schuermans, Loopmans, Vandenabeele 2012: 676; Knight 2012: 46] While this idea of community building is present in the respondents' comments, the socio-political nuances are not as evident.

In conclusion, the discourse provided by the respondents emphasises that the success of public art lies in its ability to meaningfully engage diverse audiences, requiring thoughtful consideration of the community, its routines, and values, ensuring that the artwork both respects and enriches the public space it occupies.

Physical accessibility

Since 2022, accessibility has been recognised as a key element in the new definition of museums: "(...) open to the public, accessible and inclusive, museums foster diversity and sustainability." [ICOM 2022] This definition emphasises both intellectual and physical accessibility. In institutional settings such as museums, physical availability and accessibility are governed by legal regulations. Cultural availability and accessibility are defined as key objectives in the *Latvian Cultural Policy Guidelines for 2022-2027* [Latvian Ministry of Culture 2021]. The state is responsible for creating an environment that ensures accessibility in museums and other institutional buildings. This includes allocating funds and controlling the implementation of accessibility requirements. However, in light of Latvia's cultural policy and the ongoing issue of not having a dedicated contemporary art museum, artists, curators, and organisations involved in contemporary art often have to seek spaces outside of established institutions that do not offer any necessary adaptations. Exhibitions are often held outdoors, in abandoned factories, in degraded areas, etc.

In these cases, artists, curators, producers, and others involved face numerous challenges and additional burdens when creating exhibitions and adapting spaces for art. One common issue is the lack of physical accessibility in these environments. The artists interviewed expressed that exhibition curators and producers should prioritise these concerns. However, some argue that such spaces may never fully accommodate the needs of all individuals, suggesting that it is necessary to focus on a specific group for whom physical accessibility is provided. From another perspective, some respondents expressed the belief that considering the physical accessibility of their work might negatively affect the artwork itself: "As someone who is not as young anymore, I find it important to have places to sit. This concern is quite sensitive, as it should not interfere with the overall presentation of the artwork." [LKA-T-12-2]

However, the art professionals interviewed generally agree that physical accessibility – such as ease of entry, the environment, lighting, noise control, management of visitor flow, etc. is essential for the artwork to be appreciated fully.

Methods of creating interaction and experience of space

Conducted interviews show that professionals, whether knowingly or unknowingly, use certain methods of working with the space and creating interactions. Curators and artists in their practice learn to lead the viewer. Their acquired professional visual thinking changes how they look at space and what they do with it, what will be the first thing that the viewer sees when walking in, and what will they see from each spot in the room. The curator begins to think spatially and tries to organise space in the most effective way to achieve their goal of interaction. This unconscious or implicit shaping of audience experience ties directly to the ongoing discourse in curatorial theory about the ethical responsibilities of the curator. As Paul O'Neill notes, curators are not neutral facilitators but active agents who frame how artworks are encountered, interpreted, and remembered [O'Neill, 2012: 45–49]. In this light, the use of spatial and dramaturgical methods – whether intuitive or deliberate – becomes a powerful curatorial tool, shaping how the viewer moves, feels, and responds in the exhibition space. Recognising this agency is crucial, as it reinforces the idea that curators bear responsibility not only for content selection but also for the ethical and affective dimensions of audience engagement.

However, the interaction is difficult to predict. The artwork has to be effective on its own, and that effectiveness can be increased by the space it is in, but the end result is difficult to foresee: "With feeling and experience develops a notion of what could happen in this space when the viewer enters it for example. And other times you can't predict how this action will end. But... yes, with this format [you] can play and create more controlled, open experiences."[LKA-T-14-2]

Contemporary art, its creation, and exhibiting praxis is very intentional, and that intention is revealed in the interviews conducted during this project. The setting of the exhibitions is no accident; it is curated by art and space; the artist and the curator. Viewers entering an art space are influenced by the rules of conduct it implies. Classic rules like "watch and don't touch" may not apply anymore: "(...) in the end, every viewer does whatever they want anyway, so [you] don't really have as much power over it, except if you like drawing arrows." [LKA-T-16-4] Organising of space and movement in it is a constant negotiation between proximity, distance and peace between the viewers and the art exhibited [Christidou 2016: 3].

The professionals interviewed during this project describe different ways to think about interaction and create the space for interaction to occur. Using not only artworks themselves but also their placements, descriptions, lighting, elements of surprise, etc. It may be important to create a space that interests the artists themselves, creating personal intrigue: "[it was important to me] also to create an interesting experience of the space for myself, I like to turn a corner and don't really know what you'll see, not like you're hiding something there, but that it has an unexpected element to it. A dynamic of some kind, a surprise of some kind." [LKA-T-7-1]

Some expressed not wanting the exhibition to be just something to look at, wanting the viewer to be engaged with what has been displayed. Creating an interactive viewing experience might be crucial to deepen the experience and make it more meaningful. Many of the interviewed noted that they wanted the experience to be longer and not end as soon as the person leaves the gallery, that they could in some way take it with them. Some describe exhibitions' potential to be a process rather than a static experience: "I didn't want it to be an exhibition-exhibition; often you come to the exhibition, look at the pieces and you go home and the story ends. I wanted for the people who come to this exhibition to sort of become (...) it to be a process-like event, (...) you can be involved with the pieces, (...) directly relate to them or leave your thoughts, and it's a process where all together we consider some kind of question."[LKA-T-6-1]

The viewing experience can be demanding on purpose. Artists note that if the person is determined to be in a rush, it is very difficult, almost impossible, to make them slow down and really experience the exhibition, proposing that some comfort must be given to them if they are to spend a longer time immersing themselves. Some tools include a comfortable seat to watch a long video piece, headphones to make the space shrink and feel more intimate. Interviews show that often the aim is to create a space to interact and experience something in the art and the space at hand, not to convince the viewer of something: "It's not that you have to understand or that you have done it wrong. Create your own interpretation." [LKA-T-16-4] Artists and curators offer an experience and a space for freedom and co-creation of meaning.

Conclusions

From the perspective of art professionals – artists, curators, managers of art institutions and galleries – constructive interaction with the audience is part of the artistic experience. Constructive interaction refers to the strategies used for meaningful engagement between the viewer and the artwork, as a two-way communication occurs between the artwork and the viewer, and individual interpretations and emotions can shape the experience of art. Galleries and other art spaces with their available resources provide a path along with cues for possible interaction which the viewer is expected to follow and interpret. Exhibition is both the stage set and the script. [Christidou 2016: 3] Therefore, it is important to consider this aspect at every stage of artwork production, from the initial idea and concept to the exhibition and communication of the final result.

Various elements and discourses emerge from interview data, highlighting the factors that contribute to constructive interaction within art practises. Providing a hospitable environment can enhance the visitor experience by ensuring physical comfort and, therefore, a mutual presence between the artwork and the viewer. A mutual cohesion between the space and the artwork can benefit the general impression of an exhibition and pave the way for constructive interaction. The context or daily function of a space can impact the presence of an artwork by either complementing it or giving the impression of an alienated object. Additional context of the artworks can be added using informative materials that are accessible to the viewer but not overwhelming. Public art engages with a wide variety of audiences, and in order for constructive interaction to take place, it should respect and enrich the community and public spaces it inhabits.

To ensure a more precise understanding of interaction and the role of the viewer as an art experiencer, further in-depth research on the perceiver's experience, expectations and other related aspects is needed.

Acknowledgment

This research has been supported by the research project competition *Development of Scientific Activity at the Latvian Academy of Culture* organised by the Institute of Arts and Cultural Studies and the Latvian Academy of Culture.

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THE INTERACTION BETWEEN CREATIVITY AND LAW: ARTISTIC FREEDOM AND PUBLIC INTEREST IN LATVIA

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Abstract

The interaction of creativity (terms "innovation", "creative process", "creative activity" and "creativity" are also used synonymously) and law gives rise to discussions and issues of application of legal norms, trying to ensure a balance between manifestations of legal norms, creative freedom and public interests. Creativity exists within a legal framework that both promotes and restricts its expression. Laws regulating creative activities are necessary to protect the rights of creative individuals, promote cultural development and maintain societal values while protecting public interests related to social responsibility and ethics. Creative freedom allows artists to address controversial or provocative issues, challenge societal norms and promote public debate. However, it is not absolute. Legal boundaries are set to prevent expressions of creativity that harm public interests. The task of setting boundaries without violating creativity is a challenge for the legal system and the legislator. Public opinion, cultural values and historical context influence what is considered acceptable or unacceptable in creative activity. Legal regulations that protect public morals or safety may impose restrictions, but it is important to ensure a foundation and balance so that creative activity maintains its freedom and continuity. As part of the study, the authors examine the understanding of creativity in law, including the freedom of creativity stipulated in Article 113 of the Constitution of the Republic of Latvia, the priorities for the expression of creativity set out in the policy planning

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.558

ISSN 2500-9974

CULTURE CROSSROADS

documents of the Republic of Latvia, as well as current practice of analysis (the so-called "Puppet Opera" case, "Gossip Case", "Brekte's Mural").

The aim of the study is to explore the understanding of creativity in law and to clarify how the legal system and public interests influence creative expressions, focusing in particular on the restrictions on freedom of creativity and the legal framework that promotes or restricts creativity in modern society, answering questions about the proportionality of creativity and legal framework – to what extent is freedom of creativity protected by law, and how are limits set to prevent potentially harmful effects on society, and what protective mechanisms are necessary for the legal framework to proportionately ensure both creativity and public interests without turning into censorship.

The study concludes with conclusions and proposals for the development of the understanding of creativity, including the improvement of legal framework: a diverse understanding of creativity is observed in Latvian regulatory acts, mostly associating it with artistic creativity. This approach is not only restrictive of the expressions of creative persons, but can also limit the rights and legal protection of creative persons – including, būt not limited to authors. The assessment of creative work is always related to a certain context, including public opinion, cultural values and historical events, as well as the knowledge, experience, perception and assessment of each member of society. This is relevant for the possible impact of creativity on society and its various groups. The state is obliged to balance the protection of freedom of creativity and the interests of society.

Keywords: *artistic freedom, creativity, law, normative regulation, public interests*

Introduction

Creativity (as well as terms "innovation", "creative process", "creative activity" and "creativity" are also used synonymously quite often, although the authors of the article are aware that it is possible to reveal their terminological specifics) is mostly associated with culture, with artistic activity and its manifestations. However, it is also undeniable in the manifestations of other sectors and professional fields of activity, emphasizing a different perspective on a specific situation or problem, creating innovations, a different approach or thinking [Why do We Need Creativity? Child's Creativity Lab]. For example, in legal science and practice, the term "legal creativity" is used, as well as "normative act creativity", respectively, denoting "a wide set of actions and consequences, as a result of which the legal system is improved, amended or supplemented with new regulatory material" [Guide to the development of regulatory acts].

Creativity and interaction often spark debates and legal issues, particularly regarding the balance between freedom of expression and societal interests. Creativity exists within a legal framework that both promotes and restricts its expression. Laws that regulate creative activity are necessary to protect the rights of creative individuals, promote cultural development and maintain societal values, to determine and protect the interests of society, which relate to social responsibility and ethics. Creative freedom allows artists to address controversial or provocative issues, challenge societal norms and promote public debate [Bieczyński 2021]. However, it is not absolute. Legal boundaries exist to determine when expressions of creativity may harm certain interests and to protect the state, society, public figures, and individuals (for example, children). Public interests is a concept that can be interpreted in many ways and includes public safety, health, morality, labour and consumer protection and also public administrative control [Vadlīnijas par Valsts valodas likumā lietotā jēdziena "likumīgas sabiedriskās intereses" skaidrojumu 2013].

The task of determining boundaries without violating creativity is a challenge for the legal system and the legislator. Public opinion, cultural values and historical context influence what is considered acceptable or unacceptable in creative activity. Legal frameworks that protect society or security may lead to restrictions, but there must be a basis and balance for creative activity to be free and continue.

The aim of the study is to explore the understanding of creativity in law and to clarify how the legal system and public interests influence creative expressions, focusing in particular on restrictions on freedom of creativity and the legal framework that promotes or restricts creativity in modern society in Latvia, answering questions about the proportionality of creativity and legal framework – to what extent is freedom of creativity protected by law, and how are limits set to prevent potentially harmful effects on society, and what protective mechanisms are necessary so that the legal framework proportionately ensures both creativity and public interests without turning into censorship.

The article applies both general scientific research methods and methods of legal interpretation. General scientific methods such as analysis and synthesis, comparison, and case study are used to examine the concept of creativity in Latvian law, its connection with policy documents and legal practice, and how it manifests in disputes between creative freedom and societal or individual rights. The research also includes identifying causal relationships between creative expressions and their societal impact. In terms of legal interpretation, the article uses grammatical interpretation to establish the literal meaning of legal provisions, historical interpretation to understand their background and the legislator's intent, comparative interpretation to consider international approaches, and teleological interpretation

to assess the broader purpose of legal norms, particularly in reconciling creative freedom with public interests.

1. Understanding of creativity in Latvian legislation

Article 113 of the Constitution of the Republic of Latvia states: "The State shall recognise the freedom of scientific research, artistic and other creative activity, and shall protect copyright and patent rights" [Constitution of the Republic of Latvia 2014]. Thus, creativity and its freedom are a constitutional value aimed at creating unprecedented material and intangible values [Litvins 2022]. It is essential for every person, ensuring a wide range of rights to (self)expression in various sectors and areas and is closely related to freedom of speech (in the process of creativity, the author expresses his views and values) as a mechanism for protecting and guaranteeing various verbal and non-verbal expressions.

Essentially, creativity manifests itself as an activity that results in original, previously unprecedented results of mental activity (the author's works possess originality, uniqueness), or as the discovery of new, previously unknown regularities, or the use of already known regularities in a previously unknown way. In this context, the determination of creativity must take into account the extent to which the person (author) has had the opportunity to make a free choice and express their personality in the process of creating the work [Latvijas Republikas Satversmes komentāri. VIII nodaļa. Cilvēka pamattiesības 2011].

Thus, creativity is a creative process that results in the creation of original ideas, products or solutions that provide added value to society, a specific industry or an individual. It is the human ability to combine knowledge, inspiration and imagination to create something new or significantly improve the existing one. Creativity is not limited to art or culture; it is widespread in all areas of human activity, including science, technology, business and social processes.

In addition, creativity has an individual and collective dimension – it can be expressed both in the work of a single individual and in group cooperation, for example, in collective art projects, various projects or scientific research.

Creativity is usually associated with innovation, which can lead to both positive and unintended or disruptive changes. However, this human way of thinking and ability can also be provocative, even destructive, depending on how it is used and in what context it operates. For example, provocative creativity occurs when ideas or works of art challenge societal norms, traditions, or prejudices. Such creativity is often used to stimulate discussion, draw attention to social problems, or make the viewer reconsider their own beliefs. Destructive creativity occurs when creative abilities are used in a way that causes harm to people, the environment, or society

as a whole. This type of creativity is often deliberately directed towards destructive goals [Mehlum, Moene, Torvik 2003].

Creativity has a dual nature – it can be both a powerful driver of positive change and a tool for destructive action. Ethical issues play a crucial role here. Who determines what the acceptable limits of creativity are, and where does it become a dangerous or destructive force? Is provocation always valuable, or can it create more division than understanding? On the one hand, creativity must be free from constraints in order to implement new ideas and perspectives. On the other hand, this freedom requires responsibility, because the impact of each creative act can be broader than initially intended.

The balance between freedom and responsibility in creativity is a challenge that requires both individual ethical awareness and the ability of society to openly evaluate and respond to diverse creative events. provocations.

The diverse manifestations of creativity make it difficult to define clear and unambiguous terms and to regulate them legally.

Creative expressions can raise complex issues regarding the rights of others, societal values, and the common good. Particularly problematic are cases where a creative activity, although formally artistic, can offend human dignity, promote social division, or create other negative consequences that society or the legislator cannot ignore. In such situations, not only legal but also ethical assessment is essential – whether the specific expression promotes responsible public discussion and reflection, or whether it violates the boundaries that protect values entrenched in society. The balance of freedom and responsibility in creativity requires both individual ethical awareness and the ability of society to critically evaluate various creative expressions. Article 116 of the Constitution of the Republic of Latvia (*Satversme*) provides for the possibility of restricting freedom of expression and creativity if this is necessary to protect the rights of others, public security, the welfare of the state, or morality. As emphasized in the Commentaries on the Constitution, these restrictions must be assessed within the framework of the principle of proportionality – they may only be those that are necessary, legitimate and proportionate to the protected interest [Latvijas Republikas Satversmes komentāri 2011].

Artistic expressions that use provocation, irony or exaggeration should be assessed in context, taking into account their impact, public resonance and potential harm. Therefore, it is proposed to clarify the content of the concept of "destructive creativity". For example, it can be divided into two types: 1) intentionally harmful creativity, such as hate speech or provocations with the intention of harm, and 2) unintentionally harmful creativity, such as works of art that accidentally offend or traumatize. Such a typology would help to more clearly define borderline situations and legally justify when and how expressions of creativity should be restricted. This search for a balance

between creativity and societal values is also highlighted in scientific literature. For example, Martha Nussbaum emphasizes that creativity can be both a means for the ethical growth of society and a potentially destructive force if it is exercised without empathy and responsibility for the consequences [Nussbaum 1997]. Paul Kearns analyses the limits of freedom of artistic expression, emphasizing that the concept of "responsible creativity" is necessary especially in cases where expressions affect children, minorities or the general perception of dignity of society [Kearns 2013].

This assessment is also significant in the context of copyright. Article 4 of the Copyright Law states that the subject of copyright protection is the author's original literary, artistic or scientific work, regardless of its form, mode of expression or value [Copyright Law 2000]. Thus, protection applies to the result of creativity – the work, not to the creative process or idea itself. If the work is not original or does not reach the socially accepted threshold of creativity, it may not be recognized as an object of law. Mark Rose emphasizes that copyright is a social contract – it is based on an assessment of what a given society recognizes as valuable, imitable and shared [Rose 1993]. David Throsby, in turn, reminds us that creativity has not only economic, but also cultural and ethical value, which can be threatened if creativity is directed towards destruction or social polarization [Throsby 2001]. Thus, if the result of creative expression causes significant harm or ignores the common values of society, such expression may not only be limited by legal norms, but also not be considered an object of copyright protection if it does not meet the criteria for qualifying a work. Freedom of creativity always exists alongside responsibility – both in a legal and ethical sense.

This approach is also confirmed by the opinion established in Latvian law that copyright is not absolute and can be limited for the benefit of public interest, for example, for the needs of education and scientific research. As Rihards Gulbis and Ilona Tomsone point out, such a limitation is legally permissible if it is justified, proportionate and serves the broader public good. The area of freedom of creativity should also be assessed analogously – freedom is not permissiveness, and the protection of the fundamental interests of society can justify certain limits on creative expressions [Gulbis, Tomsone 2013].

Analysing the provisions of Latvian regulatory enactments, it can be concluded that there is terminological diversity in them, both in designating and defining creativity, and also in determining its framework. For example, Article 1, Clause 7 of the Law "On Prevention of Conflict of Interest in Activities of Public Officials" includes the term "creative work", which (relatively narrowly) means journalistic, literary or artistic activity for which a royalty or fee is received [Law "On Prevention of Conflict of Interest in Activities of Public Officials" 2002]. In contrast, the purpose of the Law on the Status of Creative Persons and Professional Creative Organisations

is to promote the development and strengthening of professional artistic and scientific creativity, by which is meant professional artistic creativity in the fields of architecture, design, theatre, music, visual arts, dance, literature and cinematography and scientific creativity in the relevant creative fields, emphasizing in particular that the regulation of the law does not apply to creativity as an expression of amateurism, crafts and scientific creativity not related to creative fields [Law on the Status of Creative Persons and Professional Creative Organisations 2017]. In turn, a creative person within the meaning of this law is a natural person – an author or performer within the meaning of the Copyright Law – if:

1) he is a member of a professional creative organization;
2) he creates or interprets works of art in the creative fields specified in the law;
3) the works or performances created by him have been made public within the meaning of the Copyright Law for at least three years before acquiring the status of a creative person;
4) this person contributes to the development of professional art and culture through his creative activity and this is confirmed by the relevant professional creative organization [Law on the Status of Creative Persons and Professional Creative Organizations 2017].

As can be seen, the concept of creativity and its manifestations within the meaning of the Law on the Status of Creative Persons and Professional Creative Organizations is narrower than that set out in the Copyright Law, defining every work of an author as the result of creative activity in the field of literature, science or art, regardless of the type, form and value of its expression [Copyright Law 2000].

A more extensive explanation of creative activity is included in the "Cultural Policy Guidelines for 2022–2027 "Cultural State"", indicating that creative activity is any "cultural process that results in the creation or communication of cultural values", respectively, cultural values being defined as the results of artistic, industrial or craft creative activity, which, in addition to their possible commercial value, also have symbolic meaning and cultural value, and which create or may create intellectual property, regardless of whether they are protected under existing intellectual property legislation or not [Cultural Policy Guidelines 2022–2027 "Cultural State" 2022]. In contrast, the understanding of a creative person in these guidelines is relatively narrower, appropriately emphasizing their authorship within the meaning of the Copyright Law, professionalism and remuneration – "a creative person – an author or performer – who carries out professional creative activity in the cultural and creative sectors, creating and communicating cultural values and contributing to the development of culture; creative persons usually have education and skills appropriate to the specifics of creative activity, and they receive remuneration for creative activity" [Cultural Policy Guidelines 2022–2027 "Cultural State" 2022].

Based only on the above-mentioned findings, creativity, according to the guidelines, is still a priority of cultural policy, in fact, continuing the previous cultural policy guidelines "Creative Latvia" [Kultūrpolitikas pamatnostādnes 2014.–2020. gadam "Radošā Latvija" 2014].

The creativity of every person and its promotion as a fundamental principle in the regulatory framework, moreover, going beyond the framework of the culture and art sector, has been strengthened in the Latvian general education curriculum, emphasizing that "creativity is a process in which new ideas arise that are useful for a person or a group of people, but entrepreneurship allows these ideas to be implemented in practice, achieving personal and societal goals" [Caurviju prasmes]. For example, in the state basic education standard, one of the transversal skills is "creativity and entrepreneurship" – "a student is open to new experiences and challenges, seeks and sees diverse opportunities to improve the current situation, takes the initiative and is persistent in turning an idea into a useful solution or product" [Cabinet Regulation No. 747 Regulations Regarding the State Basic Education Standard and Model Basic Education Programmes 2018]. The aforementioned perceptual skill is developed and deepened in secondary education – "a student, looking at the situation with interest and from different points of view, notices new opportunities and offers various, original solutions, proactively seeks opportunities to improve the quality of his or her own and others' lives, knows how to manage the process from idea creation to implementation, uses mistakes as an opportunity for growth, and maintains calm and openness in atypical situations" [Cabinet Regulation No. 416 Regulations Regarding the State General Secondary Education Standard and Model General Secondary Education Programmes 2019].

As noted at the beginning of this article, freedom of creativity, which is inextricably linked to freedom of expression, is not absolute. Article 116 of the Constitution of the Republic of Latvia provides for the possibility of restricting freedom of expression "in cases provided for by law in order to protect the rights of other people, the democratic state system, public security, welfare and morality" [Constitution of the Republic of Latvia 2014]. Similarly, any person, taking into account the need to protect their privacy or other essential interests and rights, may request restrictions on various expressions of creativity.

2. Creativity and its limitations in the practice of applying Latvian law

In accordance with the purpose of Part 1 of this article, the authors have chosen to analyse three situations frequently encountered in Latvia, when expressions of creativity were ambiguously assessed from the point of view of society (its possible

representatives or groups), accordingly requiring them to be limited in their consideration of the interests of the state, society and the relevant individuals.

1) The so-called "Puppet Opera" case. The essence of the case: At the beginning of 2008, information was disseminated that the Latvian National Opera's advertising poster for the play by J. Lūsēns and M. Zālīte "Puppet Opera" contained child pornography. In the centre of the poster, a naked puppet with a long nose "Pinocchio" was depicted. The aforementioned became the basis for criminal proceedings. After approximately four years, the State Police terminated the criminal proceedings. Solution: In the specific materials, when assessed in the overall context, the child's genitals are not visible at all, therefore the child's gender can only be determined based on the context of the performance. In fact, the specific image depicts an image, not a specific person, its purpose is to illustrate the idea of the performance through artistic means. The Latvian Human Rights Centre has also concluded: "Works of art are not evaluated mechanically, but in the context of the idea they illustrate, restricting the artist's freedom of expression only in individual cases when it is truly necessary to protect public interests... In this specific case, by obviously misunderstanding the concept of pornography and not sufficiently delving into the content and context of the advertising material, freedom of expression is inappropriately restricted and the creative environment is endangered" [Pūce 2008].
2) The so-called "Gossip Case". The essence of the case: Rihards Bargais published the work "Gossip" in the literary monthly "Karogs" in August 2007, in which, despite the disclaimer: "Since this is only gossip, all the events described therein are most likely fictional and any coincidence with real life is to be considered a happy coincidence", some persons recognized themselves, filing a lawsuit in court, "the statement in the publication in a humiliating, false and defamatory manner offends the honour and dignity of the plaintiff, humiliates the plaintiff in front of her children, friends, readers and Latvian society". Solution: The Senate of the Supreme Court of the Republic of Latvia overturned the regional court's judgment, which required an apology and compensation for the violation of her honour and dignity, and found:

> "Freedom of creativity and expression is not absolute and can be limited with the aim of protecting the rights of other people (...) However, restrictions on freedom of creativity must be justified, because any case of civil liability in connection with publications in literature must also be assessed as a potential act restricting freedom of creativity, which can lead to censorship. Thus, whether there is a legitimate aim

for restricting freedom of creativity must be assessed in each specific case, taking into account the principle of proportionality.

When assessing the necessity of restricting the freedom of creativity, it is important, first of all, to identify whether the specific object is a creative work and to what genre it belongs. Based on the genre of the work, the court must assess the relationship of the literary work to reality (is it fiction or does it contain information, facts that can be verified from the point of view of objective truthfulness), the form of artistic expression of the work, its content and the entire context. These are especially serious cases when the creative work is based on real events, facts, including elements of fiction.

In the event that restrictions are necessary to protect a person's reputation or privacy, the nature of the offensive elements, including the style of the offensive statements, the person's status in society, and the possibility of being recognized in the specific creative work, are of particular importance. It should also be taken into account that any creative work is essentially fiction (fiction), therefore restrictions are permissible only in exceptional cases" [Judgment of the Civil Cases Department of the Senate of the Supreme Court of the Republic of Latvia of 12 September 2012 in Case No. SKC-482/2012].

3) "Brekte's Mural". The essence of the case: Parents of students at Riga Secondary School No. 40 have objected to the mural by artist Kristians Brekte on the school building, depicting four women (goddesses) and adding a quote from artist Džemma Skulme: "We are like earthworms that must loosen the soil". Solution: The Ombudsman of the Republic of Latvia has acknowledged: "in order for a work of art to be considered in the legal sense as posing a threat to a child's mental development, it must be proven that it contradicts socially recognized standards of decency and morality. This task of proof could be extremely complex, taking into account the changing expectations and understanding of what is acceptable and what is not acceptable over time of different generations and society as a whole... Art is present in the everyday life of society, but not everyone has the ability to see and appreciate art in a work of art.... The fact that a group of people does not like a work of art is acceptable. There are also groups of people who like it or who are completely indifferent to it. However, the views of one or another group of people about a work of art should not contribute to its censorship, which is prohibited according to the Constitution" [Tiesībsargs: Murālī uz skolas sienas nav saskatāmi draudi bērnu garīgajai veselībai 2021].

Similarly controversial cases can be observed in the practice of creativity worldwide. For example, globally, one of the provocative cases in the art world is the work of the American photographer Andreas Serrano "Piss Christ" (1987). This photograph depicts a crucifix immersed in the artist's urine. A. Serrano created this work to express his attitude towards the commercialization of religion and the hypocrisy of society. However, it causes widespread public discontent and discussions about the role of religion and art in society [Campbell 2011]. In 2022, a wide resonance was caused by the advertising campaign of the fashion house Balenciaga, which used teddy bears dressed in sex toy costumes. CNN wrote: "However, there was an angry reaction on social networks to the footage showing small children with teddy bear bags dressed in outfits that looked like BDSM-inspired outfits. One child is depicted with an assortment of empty wine glasses" [Kolirin 2022].

Concluding this review of socially significant cases where expressions of creativity were assessed ambiguously, the authors of the article would like to join the recognition of the Council of Europe Commission for Democracy through Law (Venice Commission) that a democratic state should not be afraid of debates even about the most shocking and anti-democratic ideas. Such ideas should be refuted, and the superiority of democratic values should be proven in open debates. Persuasion in the course of open debates, rather than prohibitions and repressions, is the most democratic means of protecting fundamental values [Opinion of the Council of Europe Commission for Democracy through Law (Venice Commission) of 23 October 2008 CDL-AD(2008)026.].

However, all issues of creative expression should be resolved through legal regulation. Ethical norms are those through which each act of creative expression should be evaluated. The ethical aspects of creativity are complex and multifaceted, as they encompass issues of responsibility, impact on others and society, as well as the value system that determines the permissibility of a creative act. These aspects become especially important when creativity affects not only the creator, but also the wider society. Here we need to talk about the "responsibility" of creativity, namely, through creativity we can talk about influencing people: art, literature and technology can change people's views and actions. For example, an artist who uses provocative images can create discussion, but also hurt or offend, which is especially relevant today, given the speed of information circulation, its distribution "without borders". The consequences of creativity must undoubtedly be assessed: Does creative work serve society, or does it promote destructive values? For example, advertising creativity can be used to manipulate people's emotions and desire to consume. Creativity often also tests societal norms and boundaries, but this process must be based on an understanding of the consequences. The problematic issues arise from certain clashes between creative freedom and respect: everyone has the right

to expression, but where does creative freedom end and the violation of the dignity of others begin? For example, satire can be both entertaining and offensive.

Likewise, "cultural sensitivity" is becoming more relevant today, which includes the need to assess whether creative works respect cultural or religious values, or do they ignore or violate them?

The ethics of creativity require continuous reflection and discussion, as different people and cultures may interpret the boundaries of creativity differently. The main question that must always be asked during the creative process: "What will be the impact of my work on others?" If creativity is directed for good, it can promote positive change. However, without ethical awareness, as mentioned, it can become a harmful tool that promotes division, manipulation or destruction.

From a legal perspective, the conflict between the autonomy of the artist and the interests of society is also important, for example, in the protection of intellectual property rights [Bartholomew]. Copyright, although it promotes the development of creativity, can limit artistic freedom, as it stipulates that others do not have the right to use protected works of the author without the author's consent. Such an approach can become an obstacle to the creation of new works, especially in today's digital environment, where "remix culture" and the practice of collective creativity are widespread.

The role of the state is to balance the freedom of creativity with the protection of public interests. This balance becomes especially relevant when works of art challenge public moral norms or contain provocative messages. Legal regulation in such cases can serve as an instrument that ensures liability for possible harm, while preventing excessive censorship. Thus, creativity and law interact as a dynamic process in which creative freedom is protected, but it coexists with the requirements of the law to protect the common interests of society.

Conclusions

Considering the analysis of the legal regulation of freedom of creativity and its interaction with public interests, it is possible to identify several significant problems that affect both the legal understanding of creativity and the mechanisms for its protection and restriction in Latvia:

1) Both in terms of terminology and content, a diverse understanding of creativity is observed in Latvian regulatory acts, mostly associating it with artistic creativity. This approach is not only restrictive of the expressions of creative persons, but can also limit the rights and legal protection of creative persons – including, but not limited to authors.
2) Restriction of creative freedom is possible on the basis of law in order to balance and protect essential interests of the state and society, as well as

individuals who protect their privacy and the protection opportunities provided for in regulatory acts.

3) The assessment of creative work is always related to a certain context, including public opinion, cultural values and historical events, as well as the knowledge, experience, perception and assessment of each member of society. This is relevant for the possible impact of creativity on society and its various groups.
4) Excessive restrictions on creativity may indicate de facto censorship, limiting the expression of creativity, effectively developing mechanisms of self-censorship. Consequently, the benefit to society in this case will be significantly less than the possible losses, because restrictions on creativity may negatively affect culture, the daily life of society, scientific progress, etc.
5) From a legal perspective, the conflict between the autonomy of the artist and the interests of society is also significant. Copyright, while promoting creativity, can limit artistic freedom because it prohibits others from using protected works without the author's consent.
6) The state is obliged to balance the protection of freedom of creativity and the public interests of society, establishing monitoring/control mechanisms and limiting destructive creativity, while proportionately protecting the rights of the majority to development, security and morality. The legal framework provides the prerequisites for freedom of creativity and regulates the possibilities of its expression, while at the same time determining liability for possible damage. Thus, freedom of creativity is protected, but it exists alongside the requirements of the law to protect the common interests of society.

Although the current regulation provides for the possibility of restricting the freedom of creativity in order to protect the essential interests of the state and society, in practice the content of such interests must be assessed in a specific context, taking into account the criteria set out in Article 116 of the *Satversme*, such as public security, the rights of other persons, the welfare of the state or morality. In defining these interests, compliance with the principle of proportionality is essential – any restriction must be legitimate, necessary and proportionate. When determining restrictions on the freedom of creativity, it is essential to apply internationally recognised legal criteria to ensure their legality and proportionality. In accordance with Article 10, paragraph 2, of the European Convention on Human Rights, freedom of expression (including creativity) is not absolute – it may be restricted if it is "prescribed by law", "necessary in a democratic society" and serves a legitimate aim, such as the protection of public security, the rights of others or morality. This so-called The "triple test" has become the leading standard for assessing restrictions on freedom in the case law of the European Court of Human Rights. [European

Convention on Human Rights Art. 10(2)]. Similarly, UNESCO's 2023 report on freedom of creativity emphasizes that any restrictions on creative expression are permissible only if they meet three criteria: 1) necessity, 2) proportionality, and 3) prohibition of the destruction of freedom. The restriction must be directed at a specific threat, must not be excessive, and must leave room for free expression, including on sensitive issues [UNESCO 2023]. The application of such international criteria allows for a more precise definition of what is meant by "vital interests of the state and society", as well as ensuring that restrictions on creativity are based not on subjective values, but on objective, legally verifiable parameters.

Although Article 100 of the *Satversme* explicitly prohibits censorship, it is also recognized that freedom of expression and creativity is not absolute – it can be restricted in the cases provided for in Article 116 of the *Satversme*, subject to the principle of proportionality. In practice, this means that a clear legal framework is needed that would allow for the identification of when creative expressions may cause significant harm to the human rights of other persons, public security or common moral norms.

Taking these considerations into account, it would be useful to include a provision in the Copyright Law that would clearly state that copyright protection does not apply to works that contain or promote a direct call for violence, hatred or discrimination, are contrary to the fundamental values of the Constitution (human dignity, equality, democracy), violate the rights of others to privacy or honour, cause significant and demonstrable harm to public security, health or morality.

Such regulation would not serve as censorship, but rather as a proportionate boundary between individual creative freedom and the common good of society. Therefore, it would be useful to supplement Article 6 of the Copyright Law (unprotected works) with a new provision in the following wording: "contains a direct incitement to violence, hatred or discrimination or significantly violates the fundamental rights of other persons or threatens public safety, health or morals".

Although the proposal to supplement Article 6 of the Copyright Law with a provision that explicitly excludes from protection works that contain a direct incitement to violence, hatred or discrimination or significantly violates the fundamental rights of other persons or threatens public safety, health or morals would not in itself eliminate all the previously identified problems in the legal regulation of creativity, it would nevertheless make a significant contribution to ensuring legal clarity and proportionality. Such a provision would serve both as a legal framework and as a symbolic signal that freedom of creativity is not unlimited or absolute, but must be implemented responsibly, respecting the fundamental rights of other persons and the fundamental values of society. This would strengthen the balance between individual freedom of creativity and the common good of society.

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CULTURAL HERITAGE AND ETHNOLOGY

ON THE WAY WITH PURVĪTIS: THE PATH OF TATJANA KAČALOVA

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Abstract

The article reiterates the main research path trodden by art historian Tatjana Kačalova (née Rosenschild-Paulin, 1915–2010) whose investigations on the art of Vilhelms Purvītis (1872–1945) in particular and Latvian landscape painting in general, carried out since the 1960s under Soviet occupation until the beginning of the 21st century in the independent Republic of Latvia, are important landmarks in the local history of this scholarly discipline.

The historiographical lens is used for a biographical purpose – to create and contextualise an intellectual portrait of the researcher by considering a blend of various perspectives: relationships between Kačalova's multicultural background and her commitment to the construction of Latvian national canon in the arts; comparison with imperial Russian, Baltic German, imperial Soviet, and Latvian exile approaches; institutional factors from the Art Academy of Latvia to Soviet centralised science policy and issues of book industry; strategies of internationalisation in source research and interpretation; the role of interdisciplinary interests and the researcher's first artistic education; the immediate and retrospective reception of Tatjana Kačalova's manuscripts and publications; implications and afterlife of her scholarly endeavours today.

Keywords: *historiography of art history, landscape painting, Tatjana Kačalova, Vilhelms Purvītis, Art Academy of Latvia, Soviet and post-Soviet context of research*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.610

ISSN 2500-9974

CULTURE
CROSSROADS

Introduction

One of the shared territories of the written word and the visual arts is the research texts of art historians. They are useful not only for acquiring information about the topic under discussion and for understanding the research process in a historiographical context, but also for creating a professional portrait of the researcher, especially if little autobiographical evidence is left.

A revealing source in this respect is Professor Tatjana Kačalova's (1915–2010) research into the life and art of landscape painter Vilhelms Purvītis (1872–1945), the first rector of the Art Academy of Latvia. This preoccupation continued from the early 1960s, when Kačalova chose Latvian landscape painting as the subject of her scientific work, to the first decade of the 21st century, when her book on the local development of this genre in the period of 1890–1915 was published [Kačalova 2004].

In this article, the research path of Tatjana Kačalova (Figure 1) is reiterated exploring her publications and manuscripts in the light of both the circumstances of their formation and the general research context of Latvian art history. The author has been Professor Kačalova's student in the early 1990s and subsequently worked in related areas where their paths crossed until 2010 when Latvian art historians

Figure 1. Professor Tatjana Kačalova with guests at her 80th anniversary reception in the Rector's office of the Art Academy of Latvia. Painting on the wall – *Suburban Scene* (ca. 1928) by Vilhelms Purvītis from the collection of the Latvian National Museum of Art. Sitting under the picture – art historian Māra Lāce. 1995. Photo: Laimonis Stīpnieks. Art Academy of Latvia Information Centre, coll. K–54.

mourned the death of their academic Grandma [Ābele 2010b, 2010c]. Archival sources are researched in public collections, most notably the Information Centre of the Art Academy of Latvia and the Latvian State Archive of the National Archives of Latvia. Biographical details of Vilhelms Purvītis correspond to the information available in the artist's 150th anniversary book [Slava 2022]. It contains a monographic study, *Landscape with a Painter* [Ābele 2022: 385–529], as a tribute to two outstanding women, and this article may answer why one of them is Tatjana Kačalova.

"(…) we have never had such a fundamental work on the history of Latvian art"

On 5 July 1966, the staff of the Department of Art History of the Latvian SSR State Academy of Art discussed a manuscript about which the art historian and painter Romis Bēms (1927–1993) summarised: "The general impression – we have never had such a fundamental work on the history of Latvian art" [Mākslas vēstures katedra 1966: 148]. It was the dissertation *Purvītis and His School* of senior lecturer Tatjana Kačalova for the degree of Candidate of Science in Art Studies at the Ilya Repin Institute of Painting, Sculpture and Architecture of the USSR Academy of Arts in Leningrad (now St Petersburg) [Kačalova 1966a]. The meeting decided to recommend it for defence, which took place on 19 January 1967. The two-volume treatise became the basis for an inseparable union in the history of the Art Academy of Latvia, linking two of its professors across time (Figure 2).

When Tatjana Kačalova, research associate at the Latvian SSR State Museum of Latvian and Russian Art (now Latvian National Museum of Art), applied for a teaching position in the history of foreign art at the Art Academy in 1959, the woman of 44 had experienced enough to last a lifetime, just the career of an art historian still was at the beginning of the road. In the first working year at the Academy she proposed the history of Latvian landscape painting as the subject of her dissertation [Mākslas vēstures katedra 1960: 3], planning to complete her research by the middle of the 1960s. In 1963/64, a refinement of the topic was agreed, focusing on Purvītis and his school [Mākslas vēstures katedra 1964: 44].

Among dissertations by art historians from Latvia during the Soviet period, Kačalova's treatise was the single explicitly personality-centred work. Moreover, it highlighted a figure that was not unanimously accepted and nevertheless could not be overlooked by Soviet power. On one hand, Purvītis died as a displaced person in the last winter of the Second World War in Germany, having abandoned Riga, where he had been one of the symbolic pillars of Latvian sovereignty. On the other hand, a large-scale treatise about him could confirm Soviet claims on the cultural capital of this artistic figure. Although such considerations were far from Kačalova's approach, they help to realise how she was allowed to stay on her chosen track. As

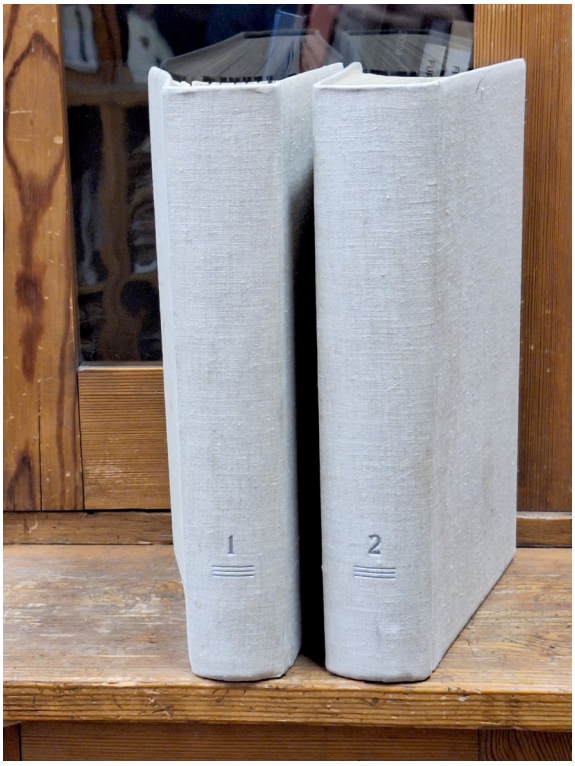

Figure 2. Volumes of Tatjana Kačalova's candidate dissertation *Purvītis and His School* (1966) at the Art Academy of Latvia Information Centre. Photo: author of the article.

there were no opportunities to defend dissertations in art history in Latvia and in Latvian throughout the whole period of Soviet rule, Kačalova's ability to elaborate her manuscript in Russian was an advantage making the progress towards the aspired qualification smoother than in other cases.

Furthermore, Purvītis was an offspring of St Petersburg Imperial Academy of Art, awarded with the Grand Prix for his 1897 graduation piece of Ukrainian-born Professor Arkhip Kuinji's (1841–1910) Master Class and elected Academician in 1913. Seen in the desired light, Latvian painter could be "welcomed back" in the city of his alma mater, using this bond for highlighting the dependence of Latvian national art on Russian foundations. In 1962, the 90th anniversary of Purvītis' birth was celebrated with an exhibition of his paintings at the State Russian Museum in Leningrad, where old people were said to treasure memories about his early career [Literatūra un Māksla 1962]. Having left museal work in 1960, Kačalova did not contribute to this event supervised by her former boss Arturs Eglītis (1907–1996). However, her files at the Art Academy of Latvia Information Centre hold a copy of the Leningrad exhibition catalogue [Eglītis 1962], crisscrossed with the owner's notes and corrections.

Flashback one. The painter and his researcher as contemporaries: Missed encounters

Latvian bookshelves at the time contained two portfolios of colour reproductions of Purvītis' paintings [Siliņš 1943; Sudrabkalns 1946] and a book about Purvītis by his former student, painter and art critic Oļģerts Saldavs (1907–1960). This work was a presence-evoking fruit of the Khrushchev Thaw, achieving the goal "to focus on the great artist in general and in large strokes, in order to keep his monumental figure and its importance in Latvian painting before the eyes of our generation" [Saldavs 1958: 4]. Previously, a monograph by art historian Jānis Siliņš (1896–1991) [Siliņš 1944] had failed to go to print due to the return of Soviet army in 1944 and its author spent the second half of his long career on the Western side of the Iron Curtain (see below). In the spring of 1944, however, Latvian readers received a collection of essays about an international selection of artists – Purvītis in Latvia, Leo König (1871–1944) in Germany, Edvard Munch (1863–1944) in Norway and Frans Masereel (1889–1972) in Belgium – by artist and essayist Kurts Fridrihsons (1911–1991) [Fridrihsons 1944]. The second of the portfolios mentioned above [Sudrabkalns 1946] consisted of colour plates that were prepared for Siliņš' forthcoming book in advance during Purvītis' 70th anniversary exhibition in 1942.

Unlike Siliņš, Saldavs and Fridrihsons, Tatjana Kačalova had never met her protagonist. An indirect meeting, however, did take place when the magazine *Atpūta* (Leisure) featured images of paintings by the famous Professor Purvītis and Tatjana Rosenschild-Paulin, an art student of Russian origin [Atpūta 1934, 1935]. Her Symbolist compositions were praised in the exhibitions of Konstantin Vysotsky's (1864–1938) art studio, inspiring reviewers to predict her brilliant future in the stardom of art [see Ābele 2025: 117]. Having travelled to Paris with a purpose to learn modern religious painting in the studio of Maurice Denis (1870–1943) in 1936, she returned to Riga, assisted her teacher Vysotsky and married pianist, organist and composer Nikolajs Kačalovs (Nikolaj Kačalov, 1911–1997) in November 1937.

In January 1938, Kačalova applied for painting studies at the Art Academy of Latvia and was enrolled in the second year of the programme but she did not return after the summer break and gave birth to her first child at the end of the year [Ābele 2025: 130]. When Ingrīda Burāne asked Professor Kačalova "if when you were studying painting at the Academy you had the chance to meet him" or observe him in the corridors of the Academy, her answer was "no" [Burāne, Kačalova, Ogle 2001: 5]. Although it is easy to misinterpret Tatjana Kačalova as a student of Purvītis [see, e.g., Petre 2019], the general painting and drawing classes she attended were run by Valdemārs Tone (1892–1958) and Kārlis Miesnieks (1887–1977) while Purvītis worked with students of his Landscape Master Class and did not appear in her orbit

[Ābele 2025: 134]. In 1942, when Purvītis' 70th anniversary exhibition was taking place in the Riga City Art Museum, the Kačalovs family was expecting their third daughter and the fourth was born in 1944, the year when Purvītis was bound to lose the cargo of his paintings that neither reached the destination in Germany nor showed up later.

Flashback two. Tatjana Kačalova's first steps in the field of art history

At the end of 1944, soon after Soviet army's reconquest of Riga, the Faculty of Philology of the Latvian State University launched a study programme in art history that was closed in 1951 [see Kalnačs 2023]. At the beginning of 1948, Tatjana Kačalova received the first diploma of the programme and started working at the Latvian SSR State Museum of Latvian and Russian Art (now Latvian National Museum of Art). The subject of her graduation paper was Impressionism, and the titles of her paintings in a 1948 exhibition of works by Soviet Latvian artists [Valsts Latviešu un krievu mākslas muzejs 1948: 7] manifest a turn to nature impressions.

In the early post-war years, the Kačalovs became active supporters of the Roerichist movement, and on 24 March 1948 Nikolajs Kačalovs was arrested during a visit to Moscow for participation in the transfer of theosophical literature [Dreimane 2021: 261, 266]. During the mass deportation on 25 March 1949, his wife, children and mother-in-law were forcibly resettled from Riga to Siberia. Having lost her mother just after reaching the destination in the Tomsk Oblast', Tatjana Kačalova remained the only care person for her daughters in harsh conditions [Konstante 2017: 679–681]. Although her last painted landscape studies [see, e.g., Konstante 2017: 680] date from the later phase of this exile [Burāne, Kačalova, Ogle 2001: 10], her further life and work were brimming with art and nature in a different way.

The touring exhibition of Nicholas Roerich's (1874–1947) paintings in 1958 belonged to obvious signs of the Thaw. Working with this project, the reinstated Kačalova authored four articles about Roerich's art [Kačalova 1958a, 1958b, 1958c, 1958d]. In these publications, attention should be paid to values that became essential for her perception of art, including musical evocations in painting: "(...) he raises the sonority of the colours and gives the lines and the composition a certain musical rhythm" [Kačalova 1958a]. Purvītis had been Roerich's fellow student in Kuinji's master class, and Kačalova most likely had read her "guru's" praise to his Latvian peer: "A sensitive colourist, Purvit [Purvītis] captured the spring awakening like no other." [Roerich 1936] Although Professor Kačalova in her late years was reluctant to speak about the Roerich-inspired phase in her formation and pointed to Russian art historian Vladimir Levinson-Lessing (1893–1972) as her instigator to explore Latvian landscape painting [Šteimane 2005: 12], this link between Roerich and Purvītis may have been instrumental in turning her focus to its central figure.

From profound source analysis to reflections on musicality in painting

Tatjana Kačalova based her exploration of the subject on profoundly researched visual and written sources, the list of the latter taking up more than 50 pages of the dissertation's appendix and even including Riga German press publications from the period of Nazi occupation. The conceptual scope of the treatise was highlighted by a particular motto for each chapter, mainly from the legacy of Western European painters, evoking a broad international context beyond the borders of the Russian (and Soviet) empire. Thus the Chapter III about the period of 1897–1905 was introduced by Paul Cézanne's (1839–1906) statement that "the real, prodigious study to undertake is the diversity of the scene offered by nature" [Kačalova 1966a; English translation from Danchev 2013: 337]. It was a fragment from Cézanne's letter to émile Bernard (1868–1941) on 12 May 1904, preceded by words about the Louvre as "a good book to consult" that should, however, be "only a means" [see Danchev 2013: 336–337].

Biographical errors were caused by lack of access to Latvian diaspora sources, which explains, for example, the extension of Purvītis' life by some months. Nevertheless, the scale of Kačalova's analysis of his oeuvre really surpassed everything that had been written about Latvian artists. The conclusion of the work was largely devoted to reflections on musicality in painting. Kačalova summarised that "Purvītis is remarkable for bringing the "musicality" of landscape almost to the level of the monumental and decorative painting of the old masters. This is particularly evident where the conceptual content of his landscape paintings resonates with the work of [poet] Rainis (...)." [Kačalova 1966a: 506] Like most of Kačalova's accomplishments starting from Symbolist paintings she composed as a young adult, this treatise was unobtrusively daring.

The Purvītis monograph 1971

During the discussion of Tatjana Kačalova's dissertation manuscript, Rasma Lāce (1923–2008), the head of the Art History Department, noted that the work "requires scientific effort and concentration on the part of the reader", so "it will have to be simplified when it is being prepared for publication" [Mākslas vēstures katedra 1966: 149]. In 1964/65, Kačalova had submitted a manuscript of a monograph on Purvītis to the publishing house *Iskusstvo* (Art) in Leningrad [Mākslas vēstures katedra 1964: 44]. However, this work was not promoted for publication there. In the meantime, Latvian audience had encountered the alliance of this author and subject in two articles in the magazine *Zvaigzne* (Star) [Kačalova 1961, 1966b].

In 1966, when she was finalising her dissertation, Soviet readers received the first edition of the two-volume monograph about Isaac Levitan (1860–1900) by Aleksey Fëdorov-Davydov (1900–1969) [Fëdorov-Davydov 1966]. A complete publication of Kačalova's study might have looked like a sibling of this comprehensive book but the *Liesma* (Flame) publishing house in Riga at the turn of the 1970s worked with a greatly abridged version of the manuscript.

Kačalova's book *Vilhelms Purvītis* [Kačalova 1971] (Figure 3) was published in Riga in August 1971. Its print run of 20 000 copies, exceptional from the viewpoint of the 21st century, was not extraordinary in Soviet Latvian book industry but higher than the average in the arts' section. Kačalova invited the readers to discover Purvītis as a painter who not only applied "Kuinji's principle of generalisation of natural impressions" and "Levitan's lyrical perception of nature" to the task of creating a Latvian image of nature, but also "borrowed from contemporary and partly classical art of Western Europe" means of expression that "contributed to the further development of all Latvian painting" [Kačalova 1971: 5]. It was a clear assertion of equality between Russian and Western artistic impulses.

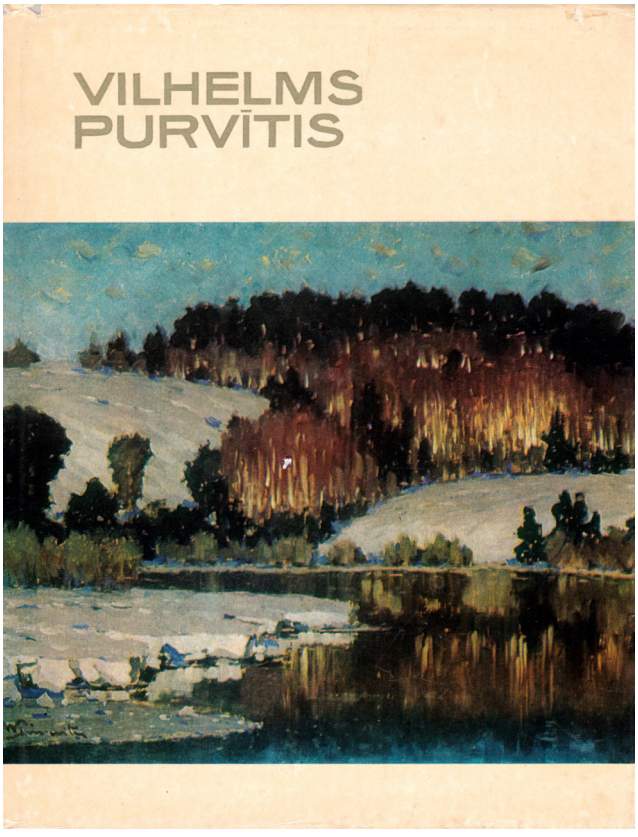

Figure 3. Tatjana Kačalova's book *Vilhelms Purvītis*. Riga: Liesma, 1971. Image on the dust jacket – *When Forest Wakes Up* (ca. 1930) by Vilhelms Purvītis from the collection of the Latvian National Museum of Art. Book design by Arvīds Jēgers.

Retrospectively, tributes to Tatjana Kačalova for establishing "a new level of interpretation" and prioritising "specific art-historical issues" that "remarkably distinguished these texts from previous post-war monographs" are paid by Eduards Kļaviņš [Kļaviņš 2014: 19], highlighting her dissertation and monograph as important milestones in the research history of Latvian art. In a particular survey on Latvian artists' monographs, Stella Pelše describes Kačalova's 1971 book as a proof that "the genre of the monograph becomes more serious, moving away from the twin traps of fictionalisation and ideologisation in the direction of the thoroughness (...) and focusing on the works and their formal qualities as a dynamic whole" [Pelše 2012: 95].

Almost every documented contemporary opinion contains critical remarks about the printing quality of the book. In a discussion of 1970–1972 art book production, three speakers at the Latvian SSR Artists' Union agreed that the most comprehensive work was Kačalova's monograph, but pointed to alleged inaccuracies in dates and titles, and expressed their regret about typographic failures and missing numbering of images [Literatūra un Māksla 1972]. In another review, art historian and journalist Ausma Balcerbule (1927–2010) found the fusion of a popular presentation and academic study not to be entirely successful, indirectly suggesting that the book still remained too scientific [Balcerbule 1972].

One of the exile representatives of Purvītis School, painter Jānis Gailis (1903–1975), wrote from the USA to his peer Jānis Sudmalis (1887–1984) in Liepāja, Latvia: "Purvītis' new monograph makes me very sad. The same with everyone I've shown it to. It's a small book, half the size of mine. The pictures are small, postcards, most of them half the size of a postcard. (...) The writer, as you say, belongs to an older generation, but I'm not familiar with the name." [Gailis 1971] Nevertheless, this work turned another exile personality into a constant admirer of Kačalova's writings. In 1977, novelist Gunars Janovskis (1916–2000) in England revealed to his colleague Zigmunds Skujiņš (1926–2022) in Riga that "I like Kačalova's approach, attitude, narrative (...). I have appreciated her from the time of the Purvītis monograph" [Janovskis 1977].

Kačalova's study presented Purvītis' achievements by the First World War more convincingly, while on the question of his creative activity in independent and then occupied Latvia, this book requires a critical ability to identify distortions or omissions caused by the ideological constraints of the time of publication. Compared to the thesis, the range of references was reduced, in some cases by a contrivance: to claim information obtained from a controversial source as having been found e.g. in an undated manuscript. Thus, Purvītis' essay "My Way to Art" from the magazine *Ostland* [Purvītis 1942] became a find in the museum archive, where a Russian translation of this material is preserved, probably the work of Kačalova herself, omitting the final part of the publication, which mentioned Purvītis' pupil Alfred

Rosenberg (1893–1946) from the years 1906–1909 in Tallinn – the notorious Estonian-born head of the Reich Ministry for the Occupied Eastern Territories in 1941–1945. Outlining the body of written sources, Kačalova pointed to articles from "Latvian, Russian and German magazines and newspapers of Purvītis' lifetime" [Kačalova 1971: 5]. References reveal that she also explored French reviews about the exhibition of Latvian art in Paris in 1939 [Kačalova 1971: 197]. However, the post-war exile writings were a *terra prohibita*: even if the author accessed some sources of this group they had to remain invisible. The divide of the horizon becomes obvious in the information about Purvītis' death, giving two dates – the incorrect 18 March 1945, preserved from Saldavs and the dissertation, in the main text and the correct 14 January 1945 in a footnote [Kačalova 1971: 123].

The divided horizon: Tatjana Kačalova and Jānis Siliņš

Soviet Latvian and exile scholarship on Purvītis were represented by two personalities of a similar scale: Tatjana Kačalova in Riga and Jānis Siliņš in the USA. One may wonder whether Siliņš managed to identify Kačalova with art student Rosenschild-Paulin whose compositions "with fantastic motifs somewhat in the spirit of Vrubel" had attracted his attention [Siliņš 1934]. Although both of them had to deal with the loss of Purvītis' works at the end of the Second World War, their positions were not equal. Siliņš had the advantage of having explored the doomed-to-perish major part of Purvītis' paintings and interviewing the artist, whereas Kačalova dug much deeper in the turn-of-the-20th-century published sources and archival documents in Latvia and Russia. Considering contradictions between their interpretations, it has been suggested that "Kačalova presumably had very poor German language skills and Siliņš most likely had difficulties with Russian" [Ceriņa 2018 (1994): 47, 111]. On the contrary, Kačalova's knowledge of German was close to native level and Siliņš, having studied at the universities in Moscow and Kazan, kept practising Russian as art reviewer for Riga's Russian newspapers in the 1920s and 30s.

As Siliņš committed himself to the work on his multi-volume *Art of Latvia* since the mid-1960s, his ex-wife Elza Siliņa (1895–1988) provided him with materials from the Soviet side of the Iron Curtain [Vanaga 2018: 205, 216]. Thus, the chapter on Purvītis contains references to Kačalova's monograph, challenging some of her conclusions, most notably about Purvītis' alleged initial indifference to French Impressionism and Post-Impressionism [Siliņš 1980: 127]. Importantly, Kačalova used the opportunity to close the divide, integrating Siliņš' *Art of Latvia* into the historiographical background of her book about Latvian landscape painting at the turn of the 20th century [Kačalova 2004: 10].

Recurrent issues, new aspects, continuous obstacles

Tatjana Kačalova's monograph preceded the nation-wide celebration of Purvītis' centenary in 1972 when she honoured his legacy in public lectures and articles for Latvian cultural periodicals [Kačalova 1972a, 1972b, 1972c]. After the Purvītis Anniversary Conference, Latvian SSR Deputy Minister of Culture Helmārs Verners (1925–2009) reprimanded the organisers that "papers should also note contradictions, the existence of two cultures, and not only objective facts" [Valsts Mākslas akadēmijas Padome 1972: 74]. The "two cultures" was shorthand for antagonism between progressive and reactionary culture in capitalist society. Kačalova's point was that "on the occasion of the anniversary we should talk first of all about his creativity, about Purvītis' positive contribution to the development of Latvian culture" [Mākslas vēstures katedra 1972: 17 [7]]. This episode offers a glimpse into the complexity of navigation between the permitted and prohibited that belonged to the routine of all scholars who were bringing results of their research to the public.

Kačalova's road to her next monograph on landscape painting in Latvia in the Soviet period and doctoral degree for a dissertation on this subject spanned two decades. During the academic year 1974/75, the author reduced her dissertation manuscript from 750 to 350 pages and was going to finish it by the end of 1975 [Mākslas vēstures katedra 1975: 41 [2]]. However, for a long time it was impossible to have research results published in a particular book that became a requirement for obtaining the highest academic qualification. In the second half of the 1970s, art historian Skaidrīte Cielava (1920–2005) elaborated a review of 26 pages in order to conclude that Kačalova's manuscript "lacks a rigorous Marxist methodological approach, which would prevent artists from being isolated from society and their time" and "the author has a rather vague idea of the laws and contradictions of the development of our society, of art as a form of ideology and the dialectical progression of its processes" [Cielava, undated: 66 [24]]. In general, the reviewer found the manuscript unsuitable for a dissertation or a book. However, she suggested that biographical essays, "after getting freed from inaccuracies, entanglements and sophistry", could become "rather nice little portraits" [Cielava, undated: 68 [26]].

Kačalova revised her initial proposal into a book *Landscape: Depiction of Nature in Soviet Latvian Painting* [Kačalova 1985], that enlivened Latvian art writing with elucidating analyses of paintings (Figure 4). When the Department of Art History discussed a new draft of her doctoral dissertation in 1988, Eduards Kļaviņš described the author's "ability to characterise all artists in relation to different aspects of their works of art" as a "surprising quality" that would "hallmark this work against the background of other writings by Soviet art historians" [Estētikas un mākslas zinātnes katedra 1988: 2]. The following year, dissertation was finalised

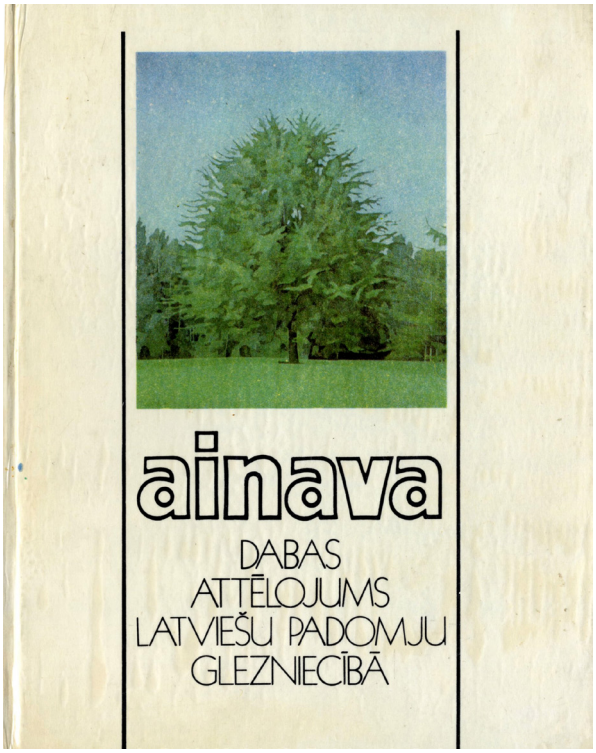

Figure 4. Tatjana Kačalova's book *Landscape: Depiction of Nature in Soviet Latvian Painting*. Riga: Liesma, 1985. Cover image – *Linden-Tree* (1974) by Bruno Vasiļevskis from the collection of the Artists' Union of Latvia. Book design by Dainis Lapsa.

[Kačalova 1989] and it brought the author the aspired doctoral degree in March 1990 [Literatūra un Māksla 1990], later recognised as *Dr. habil. art.* by the Latvian Council of Science. Thereby Tatjana Kačalova became the single art historian from Latvia to qualify for the highest degree before the collapse of the Soviet Union.

In these works, the silhouette of Purvītis was towering in the background of his former students. One of the perspectives in the researcher's approach to the key figure of her investigations was decorativity. In 1982, the Art History Department discussed her manuscript *Decorativity and Its Expressions in Soviet Latvian Landscape Painting*. The author had tracked this phenomenon, starting with the works of Purvītis and other pre-Soviet founders of Latvian landscape painting, comparing these pictures with analogies from the heritage of Russian and other foreign artists, as well as drawing parallels between fine arts and music [Mākslas vēstures katedra 1982: 46 [5]]. Although the Department recommended this study for publication as an article, it remained unpublished.

Closing the circle across the landscape

The first decade of Latvia's regained independence simultaneously was the time of Tatjana Kačalova's professorship until her retirement in 2000. With themes concerning

Purvītis returning to the fore in anniversary commemorations [Kačalova 1992] and on other occasions, this time was marked by summaries and cross-sections of the theme that she outlined at conferences in Latvia and Germany. The explored aspects included: Purvītis and the formation of the Art Academy of Latvia; Purvītis' art in the context of Baltic German painting; landscape painting and Purvītis; landscape painting in Latvia around 1900 in general, as well as with regard to Neo-Romanticism and Art Nouveau; the work of Purvītis' student Kārlis Melbārzdis (1902–1970) [Kačalova 1996, 1997, 1998, 2000, undated et al.].

Young colleagues, in their enthusiasm for new discoveries in source research, sometimes found these papers insufficiently verified. Re-reading them, however, provides insights worth pondering, even if they are not always supported by references. Thus, for instance, Kačalova concluded that "Art Nouveau did not subjugate Latvian art, but – and this seems very important – it oriented the mentality of Latvian artists in a way that, through its typical means of expression (decorativeness, rhythmisation), awakened subconscious knowledge of these values accumulated since ancient times, contributing to the formation of national art" [Kačalova 2000: 73].

In 1999, the Art Academy of Latvia proposed the Culture Capital Foundation (CCF) to acknowledge Tatjana Kačalova's achievements with a lifetime scholarship, emphasising the focus of her research: "Her fundamental dissertation on Purvītis was a text of a completely different and unprecedented quality in comparison with the vulgarly sociological monographs on Latvian artists of the previous years (...). After earlier superficial and arbitrary generalisations, T. Kačalova's methodology of analysing works of art, which was oriented towards evidential interpretation and discovery of aesthetic values, was particularly impressive." [Latvijas Mākslas akadēmija 1999] The Council of CCF acknowledged this contribution by granting her the deserved financial support.

At the turn of the millennium, Tatjana Kačalova experienced several events of Purvītis' research as a reader, visitor and spectator. She was not among the contributors of the monographic album that was published on the occasion of Purvītis' exhibition at the State Tretyakov Gallery of Moscow [Riņķe 2000]. The complexity and tension of the observer's role is revealed in Ingrīda Burāne's conversation with her at the exhibition of Purvītis works in the State Museum of Art in 2001 [Burāne, Kačalova, Ogle 2001]. Thanks to Kristīne Ogle's activities, the turn of the 21st century saw a rise in scholarship about the Purvītis Master Class of Landscape Painting and its alumni, taking up the school aspect of Kačalova's previous research [Ogle 2003, etc.]. The retired professor longed to see emergent scholars committing themselves to international research on Purvītis more ambitiously than she had managed to undertake this task in the 1990s [Burāne, Kačalova Ogle 2001: 3, 12].

Figure 5. Tatjana Kačalova's book *Latvian Landscape Painting at the Turn of the Centuries, 1890–1915*. Riga: Zinātne, 2004. Cover images – *Landscape / Elegy* (ca. 1904) by Johann Walter and *Spring Waters / Maestoso* (no later than 1911) by Vilhelms Purvītis, both from the collection of the Latvian National Museum of Art. Book design by Ināra Jēgere.

Under the guise of reconciliation with the retreat, Tatjana Kačalova worked on her last monograph about Purvītis and his time, exploring Latvian landscape painting of 1890–1915 [Kačalova 2004] (Figure 5). The researcher elucidated her subject in chapters about: the preceding developments in the 18th and 19th century; relationship between Latvian landscape painting and Baltic German art at the turn of the 20th century; exhibition scene, iconography, relationship between classical pictures and study-like paintings; the phenomenon of mood landscape; international influences; and, most notably, the contribution of individual artists, starting with Purvītis. Regardless of a disputable division of painters into grand masters and petit masters of landscape, as well as some misattributions and errors, this book remains significant as the most comprehensive overview of its subject by now, rich in insights resulting from long years of commitment to the study of landscape painting.

The publishing house *Zinātne* released this title in late 2004, a short time before the author's 90th anniversary on 11 March 2005. The interval between the two events was marked by the award of the Artists' Union of Latvia to Tatjana Kačalova for her lifetime contribution to art history [Latvijas Mākslinieku savienība 2005: [2–4]]. Asked about research pursuits at the moment, the laureate told the newspaper *Kultūras Forums* that she keeps thinking about decorativity [Šteimane 2005: 12].

Tatjana Kačalova and the early non-Latvian biographers of Purvītis

A series of exchanges between the retired Professor Kačalova and her young colleagues were related to biographical details of authors who had been writing about Purvītis in Baltic German and foreign periodicals. Some of the most often quoted sources in the 1971 monograph were articles by Roderich von Engelhardt (1862–1934), Wilhelm Sawitzky (1879–1947) and Susa Walter (1874–1945), three writers whose contribution to the local art criticism subsequently was brought out of the twilight of Baltic German cultural heritage as well as Mary Illyne, whose mystery was solved only in the wake of Purvītis' 150th anniversary.

Exploring a number of hints and clues, it became possible to reveal that the important essay about Purvītis (Figure 6) in the British magazine *The Studio* [Iljina 1905] was authored by Marija Iljina (1885–1966), a Russian General's daughter from Lithuania, an anglophile and amateur photographer who had come to Riga for school, living next door to the artist and obviously attending painting classes in his studio.

A Russian Painter

A RUSSIAN PAINTER. W. POURWIT. BY MARY ILLYNE.

THE Imperial Academy of Arts in St. Petersburg had always held fast to the traditions and teachings of the old school, and it was only some five years ago that, alive to the rising power of the new movement, it decided on a great step—it admitted amongst its jury a few of the younger painters, whose fame was only just beginning. Until then they had been passed over on account of their modernisms. However, their individuality, the strength and beauty of their art, had to be recognised and acknowledged. From that time the whole style of the Academy exhibitions was changed, and many new names came to the front. Among these one of the most prominent is undoubtedly that of Mr. Pourwit. His talent is alike recognised by the adherents of the most modern schools and those who still cling to the old style of painting. It was in the Academy that he had his earliest training, and it was the Academy that bought for its museum the picture which had earned him his first prize, the Prix de Rome. He worked, while in the Academy, in the studio of Kouindgi, a well-known landscape painter, whose teaching had, according to Mr. Pourwit, a great influence on his artistic development. Mr. Kouindgi had no fixed rules, no precepts, to impart for all alike, sanctioned by and according to tradition. He let his pupils paint in the way best suited to each: they were to try and attain an effect, work hard, and study nature.

That studying of nature is, to my thinking, the keynote of all Pourwit's works: all his paintings are true to it. Not one stroke of the brush is laid on without his having first ascertained, through endless study and observation, that that shape, that colour, really could have existed. Although, when he once sets to work, he paints with extraordinary rapidity, he often paints for a whole year or more at the same picture before he finishes it, if he is not quite sure of the effect he is trying to reproduce. He waits for the same time of year, goes back to the same neighbourhood, and tries to catch the same effect over and over again; then, and not

"SOLEIL EN MARS" BY W. POURWIT

XXXIII. No. 142.—JANUARY, 1905. 285

Figure 6. First page of the essay *A Russian Painter. W. Pourwit* by Marija Iljina (Mary Illyne) in the journal The Studio, Vol. 33, No. 142, 1905, p. 285. Image – *March Day / Sunny March Day / March Sun* (no later than 1900, destiny unknown) by Vilhelms Purvītis.

Soon after the release of the publication, Iljina, aged twenty, became a lady-in-waiting in the Russian court; she served as a nurse in the First World War, lived in exile and died in Cannes in the year when Kačalova was finalising her candidate's dissertation in Riga [Ābele 2022: 388–389]. Thus, it turned out that Kačalova who was reticent about her baronial ancestry [Šteimane 2005: 12] is not the only Russian noble woman having contributed to promotion and research of Purvītis' art. Thereby her work can be discussed also in the succession of local non-Latvian writings on Purvītis where her most remarkable predecessors were Iljina and Engelhardt.

Iljina introduced Purvītis as a "Russian painter" [Iljina 1905: 285], and an imperialist attitude pervades her essay that at the same time contains valuable observations and insights about the qualities of Purvītis' art. Certainly, in terms of statehood Iljina was not wrong, and the Latvian painter in the international exhibition scene of the early 20th century was an artist from Russia. Engelhardt changed the label from "Russian" to "Baltic" emphasising Purvītis' leadership in the Baltic Provinces and prioritising it to both imperial (Russian) and emancipating ethnic (Latvian) aspects [Engelhardt 1912: 184]. Kačalova positioned Purvītis among the founders of Latvian art, thus committing herself to the building of the national cultural canon. In general, she joined the strong 20th-century ethnocentric tradition in Latvian art history writing but in details her approach involved transnational interest in multicultural contexts. With the exception of dissertation texts, some articles for Riga Russian newspapers by the late 1950s and papers presented elsewhere in Soviet Union the main language of her publications was Latvian.

The final perspective

Vilhelms Purvītis wrote that "the road [to art] itself is long, it has no end, and if there seems to be a goal on the horizon, it disappears into the distance as one gets closer. However, as long as the artist continues to follow his goal and remains faithful to his vocation, his service to art has not been in vain. When he gives up his goal, he also loses himself." [Purvītis 1942: 24] The same could be said of the research path, and Tatjana Kačalova managed to follow it faithfully.

If it would be necessary to summarise her attitude concisely, the whole story might be replaced with two words – "Purvītis resounds!" The author of the article remembers them expressed by the lady of 82 in a discussion about attribution issues of the painter's works during his 125th anniversary memorial conference at the State Museum of Art in Riga in 1997. The venue of the event was the permanent exhibition of paintings, and the speaker left an impression of a conductor guiding the orchestra of painted landscapes. The scene and the phrase refer to Kačalova's inclination to identify analogies between visual and musical creativity. In Soviet Latvia, she was the only art historian continuously reflecting on acoustic associations evoked by

turn-of-the-20th-century paintings, and this aspect of her interests in the guise of such notions as decorativity still awaits profound investigation reaching beyond a memorial dedication [see Ābele 2010a: 39].

In comparison with other art historians born in the 1910s or 1920s and active in Soviet Latvia, Tatjana Kačalova's career was relatively fulfilled. In the "family tree" of Latvian art history, her reputation, marked by a combination of reticence, resilience, intellectual activity and aesthetic sensibility, epitomises a "precisely invested life", as art critic Inga Šteimane entitled her 2005 interview with Professor Kačalova [Šteimane 2005: 1]. She would not accept that the focus of interest is turned on her, not on Purvītis. However, it is worth trying to understand the complexity of her tasks in their time by looking at the less visible or previously unknown steps on her journey of discovery, as well as to experience the sense of artistic vibrance that permeates Kačalova's perception, encouraging us to engage her insights in a continuing dialogue. On one hand, her research on Purvītis, just as her teaching of foreign art history throughout the Soviet occupation period and beyond was a great benefit to the society. On the other hand, the time of wide international research opportunities came too late for a full spread of wings towards transnational visibility and expansion of these exploits. Therefore, and for the sake of good luck, it is necessary to be aware of her contribution as part of the continuing research adventure.

Acknowledgment

The article belongs to results of the Art Academy of Latvia research group in the project "Cultural and Creative Ecosystem of Latvia as a Resource of Resilience and Sustainability" / CERS (No. VPP-MM-LKRVA-2023/1-0001), funded by the Ministry of Culture of the Republic of Latvia in the framework of the State Research Programme "Latvian Culture – a Resource for National Development" (2023–2026). Personal thanks of the author go to Ingrīda Burāne, Jānis Oga, Gunta Ploka and Edvarda Šmite.

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NEEDLEWORK MEN'S BELTS IN THE ETHNOGRAPHIC TRADITIONS OF THE BALTIC STATES: A COMPARATIVE STUDY OF LATVIA, LITHUANIA, AND ESTONIA DURING THE SOVIET PERIOD

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Abstract

This article examines the shared and distinctive characteristics of needlework men's belts in the Baltic states, with a focus on research methodologies and historiographical perspectives. Central to this study is the *Historically Ethnographic Atlas of the Baltic Peoples. Clothing* (1986, *Историко-этнографический атлас Прибалтики. Одежда*), which includes a dedicated chapter on belts. The analysis of needlework belts from the 19th and early 20th centuries highlights the ideological influences shaping interpretations of traditional clothing. While beadwork and woolwork belts were more prevalent in Latvia and Estonia, only a few examples have been documented in Lithuania, reflecting variations in ethnographic research priorities and the evolution of museum collections. Ethnographic studies conducted during the Soviet period, as part of a broader policy on ethnic histories and lifestyles, were subject to ideological constraints. Despite these limitations and the influence of propaganda, the Atlas provides a valuable comparative framework and a significant reference point for contemporary research. This study assesses the contributions of Latvian ethnographer Mirdza Slava (1924–2001), Estonian ethnographer Eevi Astel (1938–2025), and Lithuanian ethnographers Vida Kulikauskienė (1933–2023) and Marija Miliuvienė (1931–2018) in documenting belts in their respective countries, as well as their collaborative efforts in analysing embroidered men's belts across the Baltic region.

Keywords: *Baltic textile history, Soviet ethnography, traditional men's clothing, needlework belts, beaded accessories*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.597

ISSN 2500-9974

CULTURE CROSSROADS

Beadwork and woolwork belts (in Latvia, these are called *izšūtas jostas, zīļu jostas*, *kažoka jostas*; in Estonia – *helmevööd*, *pärlvöö, nahkvöö*; and in Lithuania – *karoliukų diržai, medžioklinis diržas*) were a popular men's clothing accessory in the second half of the 19th century and the early 20th century [Kont 2014; Valtere 2023, 2024]. Initially serving both functional and decorative purposes within elite attire, they gradually became incorporated into peasant dress as broader social and economic changes unfolded. Material evidence of these belts has been preserved in museum collections, acquired through ethnographic expeditions, private donations, and individual gifts. This study analyses the shared and distinctive characteristics of needlework belts in the three Baltic states, as well as the research approaches applied to their study. It incorporates both qualitative and quantitative data, documenting 171 objects from 22 Latvian museums, 167 records from 11 Estonian museums, and 8 belts from 5 Lithuanian museums. The preservation of needlework belts in museum collections not only provides material evidence of their former social and aesthetic roles but also serves as a foundation for scholarly inquiry. Yet the ways in which these objects have been studied have shifted over time, reflecting broader intellectual, institutional, and political contexts.

Since the historical study of these belts has not been uniform across the three neighbouring countries, this research considers both regional differences in scholarly approaches and the shared heritage shaped by the collaboration of Baltic ethnographers during the Soviet period, as reflected in contemporary literature and press publications. To contextualize subsequent research trajectories, it is necessary to trace the early stages of needlework belt studies in each of the Baltic states, through which these objects first entered broader scholarly circulation and became embedded within comparative ethnographic discourse. This examination highlights how institutional frameworks, research traditions, and individual scholars established the first interpretations of these objects. Although Soviet-era research was not a direct continuation of earlier traditions, it nevertheless relied on the materials, data, and publications already assembled, reframing them within a new ideological and institutional context. Such a perspective also makes it possible to assess the impact of the Soviet regime on the study of these objects – illustrating how political conditions shaped research opportunities, restricted certain lines of inquiry, and, at the same time, promoted comparative projects such as the *Historically Ethnographic Atlas of the Baltic Peoples (1986, Историко-этнографический атлас Прибалтики. Одежда).*

Foundations of needlework belt research in Estonia before 1940

In Estonia, the development of ethnology progressed consistently prior to the establishment of an independent state (1918). This was ensured by purposeful cultural policy as well as by an institutional research structure with stable scholarly

continuity. The Estonian National Museum, founded in 1909, played a central role in consolidating ethnology as an academic discipline, with its growth shaped by several distinguished scholars and museum professionals. During this period, several fundamental studies in the field of Estonian material culture were conducted by academically trained scholars holding doctoral degrees [Nõmmela 2015]. Oskar Kallas (1868–1946) as one of the founders of the Estonian National Museum and the first Estonian to receive a doctoral degree in Finnish folklore (1901, University of Helsinki), emphasized the importance of traditional cultural heritage and promoted the large-scale collection of ethnographic evidence [Viires 1991: 124–125].

The Finnish ethnographer Ilmari Manninen (1894–1935) introduced a scientifically grounded system into museology. He developed standardized terminology, organized the museum's collection according to thematic and functional divisions, and carried out detailed studies of traditional clothing, tools, and everyday practices [Manninen 1925]. His approach, based on the functional classification of objects, their contexts of use, provenance, and regional distribution, enabled a deeper and more systematic understanding of Estonian daily life, crafts, dress, and ritual practices [Manninen 1933]. Manninen's work *The History of Estonian National Costumes (Eesti rahvariiete ajalugu)* also included an analysis of leather belts [Manninen 1927]. He observed that these could be either plain or decorated with small beads and brass fittings. In the second half of the 19th century, such belts were worn primarily by men to fasten outer garments. According to Manninen, the belts were purchased rather than produced at home; as a result, they were not widely integrated into traditional dress and consequently did not receive detailed scholarly attention. Another of Manninen's major contributions was the introduction of cartographic methods into Estonian ethnography – an approach that later became foundational for the *Historically Ethnographic Atlas of the Baltic Peoples* [Viires 1991: 123–132].

Manninen's work in the 1930s was continued by Ferdinand Linnus (1895–1941; until 1935 – Leinbok), who specialized in the study of beekeeping, peasant households, and material culture [Linnus 1932, 1939]. He was followed by Gustav Ränk (1902–1998), who advanced the study of regional architecture and traditional ways of life in his dissertation *Folk Buildings in the Province of Saaremaa* (*1939*). The collective contribution of these scholars provided a sustainable foundation for the discipline of ethnology in Estonia. Their legacy continues to provide both a theoretical framework and a practical resource for contemporary research, particularly in the field of material culture. This is also evidenced by the practical study of belt materials preserved in Estonian museum collections, which builds upon the information and objects accumulated during the early phase of ethnographic research.

The Estonian National Museum holds the largest collection of needlework belts in the Baltic region, comprising 109 items. Of these, 60 entered the museum's

collection before 1940, including 22 obtained during the early ethnographic expeditions of 1911–1913. Conducted with the active participation of volunteers - including teachers, local researchers, and students, these expeditions resulted in the acquisition of the first 20 000 objects, encompassing ethnographic artefacts from across the territory of Estonia [Õunapuu 2014].

Foundations of needlework belt research in Latvia before 1940

The organized collection of ethnographic materials in Latvia began in 1869 with the establishment of the Riga Latvian Society Scientific Commission *(Zinātnības komisija*, later – *Zinību komisija*). At the time, poet, translator, and folklore researcher Fricis Brīvzemnieks-Treilands (Brihwsemneeks-Treuland, 1846–1907) urged the public to support the collection of ethnographic information and was one of the first to propose the establishment of a Latvian museum [Treuland 1869: 257–258]. The institutionalization of cultural heritage in Latvia took root soon after the proclamation of an independent state in 1918. In 1920, the State Historical Museum was founded, with Matīss Siliņš (1861–1942) as its first director – a publicist, cartographer, and dedicated researcher of archaeology and ethnography. He began working voluntarily while the museum was still under the auspices of the Riga Latvian Society and led it until 1934. The initial mission of the State Historical Museum was defined, as follows: "To collect, preserve, exhibit and popularize various values of antiquity, as well as those of recent times, which are important in the history of Latvia" [Law on the State Historical Museum 1924]. The adoption of the Law on the Protection of Monuments in 1923 resulted in the establishment of the Board of Monuments of Latvia, with historian and commissioner Arturs Štāls (1897–1951) appointed as its technical director [Baumane 2013: 9]. Štāls emerged as a central advocate of monument protection, emphasizing the necessity of national regulations in this field and formulating a definition: "Monuments are all the creations of historically concluded cultural eras that possess historical, scientific, artistic, or cultural value" [Štāls 1922: 618–629].

The available evidence confirms that the three earliest documented examples of needlework belts in the State Historical Museum collection originated from the holdings of the Riga Latvian Society's Ethnographic Museum, today incorporated into the Latvian National Museum of History. The first was acquired in 1922 during ethnographic excursions in Northern Vidzeme and parts of Latgale, when the museum's preparator and archaeologist Edīte Elksnīte (1884–1969) obtained a beadwork leather belt from Jēkabs Kļava in Veclaicene parish. According to provenance records, the belt had been made by a local seamstress approximately seventy years earlier (CVVM 13732). In 1923, two further belts were added: a woolwork belt donated by O. Rušmanis, described as a "bride's gift" to J. Rušmanis in 1860

in Budberga parish, Zemgale (near Bauska), though recorded as manufactured in Panemune (CVVM 13726); and a beadwork belt purchased from Aleksanders Girupnieks (CVVM 13736). Collectively, these three objects constitute the earliest documented examples of men's needlework belts preserved in the museum's collection.

In addition to her duties as a museum curator and archaeologist, Elksnīte actively participated in political developments and was a regular contributor to the magazine *Zeltene* (1926–1940). Her articles explored ethnography, folklore, ethics, aesthetics, pedagogy, and other cultural topics. Travel accounts indicate her familiarity with the Skansen Open-Air Museum and the Nordic Museum (*Nordiska museet*) in Sweden [Elksnīte 1929]. Comparing the clothing of Swedish and Latvian peasants, Elksnīte highlighted several similarities in the use of belts and suits. In her writings on Estonian folk clothing, she also examined traditional belts, referencing the book Estonian Ethnography by Finnish ethnographer and professor Ilmari Manninen (1894–1935) [Elksnīte 1929: 17]. These examples demonstrate the museum staff's familiarity with ethnographic research and theoretical discourse in neighbouring countries, maintaining connections with the research traditions of the Baltic and Nordic regions.

In the years following its establishment, the State Historical Museum accumulated significant ethnographic material, laying the groundwork for the development of the *Atlases of Latvian Culture (Latvju kultūras atlanti)*. Research themes were formulated, questionnaires issued, and systematic material collection initiated [Šmits 1923; Wolter 1892]. Building on these initiatives, work on the Atlases began in the late 1930s under the guidance of Swedish ethnographer Dag Trotzig (1914–1944), then a lecturer at the University of Latvia, who served as the project's scientific consultant. The aim was to produce a comprehensive, scholarly cartographic survey of Latvian traditional culture, encompassing themes such as clothing, jewellery, architecture, household objects, folklore, customs, and other elements of material and intangible culture. The outbreak of the Second World War, however, brought the project to an abrupt halt. Much of the collected material remained in manuscript or sketch form, with only fragments later incorporated into other publications. In 1943, an instruction manual was nevertheless published, defining the scope of the project, specifying its thematic coverage, and providing standard questionnaires for fieldwork [Ancītis 1942, 1943].

In 1934, Valdemārs Ģinters (1899–1979), Doctor of Archaeological Sciences, became director of the State Historical Museum, a position he held until the autumn of 1944, when he went into exile. By that time, the museum's collection had grown to include sixty-one needlework belts, thirteen of which had been obtained during the Board of Monuments' ethnographic expeditions (1924–1932). After the Soviet occupation of Latvia in 1940 and following the merger of museums, ten additional belts were acquired from the Jelgava Museum (CVVM 13690, CVVM 13692,

CVVM 13693, CVVM 13697, CVVM 13717, CVVM 13731, CVVM 13727, CVVM 13758, CVVM 13760), along with three belts from the Valmiera Museum collection (CVVM 5018, CVVM 5019, CVVM 5020).

Needlework belts began to appear in Latvian publications in the late 1930s, a period characterized by an increasing emphasis on the territorial and regional classification of clothing, reflecting broader efforts to systematize and categorize traditional dress by region [Pīgozne 2020]. In descriptions of traditional male clothing published by the State Historical Museum, needlework belts were included by the head of the museum's Ethnography Department, ethnographer and archaeologist Ādolfs Karnups (1904–1973). The publication Novadu tērpi (Traditional Costumes of Regions, 1938), prepared for the 9th All-Latvian Song Festival, was compiled by Karnups, with technical descriptions provided by weaver and handicraft teacher Elga Kivicka (1905–1970) and illustrations by graphic artist and painter Eduards Dzenis (1907–1999). The sets of clothing were organized by region in fifteen booklets to facilitate the accurate recreation of traditional attire for each respective region. Although the museum's collection contained a considerable number of needlework belts, they were only briefly mentioned in the descriptions of traditional clothing. The attire of Semigallian (Zemgale) men was noted as the least well documented: garments of common people were comparatively better preserved, whereas the clothing of the wealthier strata had largely been lost or survived only in fragmentary form. Wealthy Semigallians were described as girding their coats with beadwork belts fastened with silver buckles [Karnups, Kivicka 1938: 347]. The 1939 SHM guide *Etnogrāfija. Valsts vēsturiskā mūzeja vadoņi I* referenced this attire, emphasizing wide leather belts decorated with beads and fastened with brass or silver buckles, while men's clothing in the Kuldīga region was distinguished by belts embroidered with floral motifs in beads or threads [Latvijas Valsts vēsturiskais muzejs 1939: 51–52, 64].

Foundations of needlework belt research in Lithuania before 1940

In comparison with Latvia and Estonia, ethnographic expeditions in Lithuania during the 1920s and 1930s were less developed and remained relatively limited in scope [Брук et al. 1986: 7]. This is also reflected in museum collection: the number of needlework belts preserved in Lithuania is significantly lower, with only eight documented examples distributed across five museums. Despite their small number, these objects represent distinctive examples associated with both peasant and elite culture. The National Museum of Lithuania *(Lietuvos nacionalinis muziejus)* preserves two particularly notable specimens. One is identified as a hunting belt (*medžioklinis diržas)*, executed in exceptionally fine microbead embroidery (approximately ten seed beads per centimetre) and displaying a complex, continuous narrative composition (LNM IM 165). Extending over 165 × 7.5 cm, the embroidery depicts a sequence

of scenes set within a natural landscape: a monk praying before a cross; a group of white stone buildings; a playful dog chasing a butterfly; grazing sheep; a watermill; a horse-drawn carriage carrying a woman and a man; a fisherman casting his line accompanied by a dog; an elegantly dressed couple on horseback; a hunter aiming at game with his hound by his side; and, finally, a man with a horse at a monumental stone gate. The belt is made of light brown leather with a buckle and adjustable strap (Figure 1). The second belt is embroidered with coloured wool threads on a black ground, featuring large floral motifs and bunches of berries (LNM IM 166). Its base is green leather, closed with a solid brass buckle, and fitted with a small adjacent pocket (Figure 2). Both belts are preserved in the museum's historical rather than ethnographic collection. According to the *Book of Acts of Lithuanian Feudal and Capitalist History Exhibits*, the objects were re-registered in 1968, following their transfer from earlier inventory records, which have not survived. The attribution of embroidered belts in Lithuania to noble attire underscores the migration of this accessory across different social strata. Since the documentation of 19th century, noble dress was not among the objectives of ethnographic expeditions in any of the Baltic states, the preservation of such exceptionally luxurious examples provides valuable evidence for examining social mobility and processes of cultural transmission.

Figure. 1. Beadwork Hunting belt. Lithuania. Glass, cotton, linen, leather, metal. Dimensions: 165 × 7.5 cm. Beginning of the 19th century. National Museum of Lithuania, LNM IM 165. Photo: LNM: https://www.limis.lt/valuables/e/805191/756245006?searchId=23236613

Figure. 2. Woolwork belt. Lithuania. Wool, cotton, linen, leather, metal. Dimensions: 138 × 13 cm. Late 19th century. National Museum of Lithuania, LNM IM 166, Photo: LNM: https://www.limis.lt/valuables/e/805191/756250475?searchId=50519022&menuIndex=0&digitalObjectId=756250511

Taken together, these developments demonstrate that by 1940 Estonia and Latvia had established institutional and scholarly foundations for the study of needlework belts, supported by systematic museum collecting, ethnographic expeditions, and early scholarly publications. In contrast, in Lithuania such foundations remained comparatively limited: expeditions were less developed, the number of preserved belts was small, and their attribution was largely confined to elite or noble attire.

Needlework belts in Soviet ethnography: *The Historical-Ethnographic Atlas of the Baltic Peoples. Clothing* (1986)

After the Second World War, Academies of Sciences were established in the Soviet Socialist Republics (SSRs) [Stradiņš 1998: 39]. Within these institutions, ethnographic research was incorporated into broader state policies aimed at studying the way of life of the Soviet people, their ethnogenesis (origin of peoples), ethnic geography (spatial distribution), and mutual interrelations [Strods et al. 1969: 7]. In 1964, ethnographers from Latvia, Lithuania, and Estonia commenced work on the *Historical-Ethnographic Atlas of the Baltic Peoples*, a planned three-volume edition [Strods 1968: 21–29]. Particular attention is devoted here to the volume *Clothing*, as it represents one of the most significant inter-state ethnographic projects of the Soviet period, bringing together for the first time in a unified compilation needlework belts from all three Baltic states. By providing a cartographically structured analysis, the Atlas established an important foundation for comparative research, which until then had been available only in fragmentary form or restricted to the national frameworks of the individual states.

The idea of mapping the locations of traditional cultural objects was not original – in the first half of the 20th century, ethnographic cartography was conducted across Europe, and the Atlas emerged as part of this broader research process [Harmjanz, Röhr 1937; Moszynski 1934]. The creation of ethnographic atlases was conceived as a common project for the entire Soviet Union and constituted an integral part of the broader tasks of Soviet ethnography. These atlases were designed to document the way of life, material culture, and ethnic history of the peoples of the USSR in a comparative framework, providing a standardized cartographic and typological representation of cultural phenomena. The underlying objective was not only scientific but also ideological: to demonstrate the cultural diversity of the Soviet peoples while at the same time reinforcing their supposed unity within the socialist system. In this context, scholars from the individual Soviet republics were primarily assigned the role of collectors, systematisers, and classifiers of ethnographic data, while the theoretical frameworks and interpretative models were developed and controlled by central institutions such as the Miklukho-Maklai Institute of Ethnography in Moscow. Thus, the production of ethnographic atlases illustrates both the scientific

ambitions and the political functions of Soviet ethnography [Karlsone, Boldāne-Zeļenkova 2021: 70].

The first volume, *Agriculture* (*Историко-этнографический атлас Прибалтики: Земледелие*), was published in 1985 by the Institute of History of the Academy of Sciences of the Lithuanian SSR [Брук et al. 1985]. The second volume was intended to focus on vernacular architecture, but despite extensive research efforts, it was never completed. Meanwhile, the third volume, dedicated to traditional clothing (*Историко-этнографический атлас Прибалтики. Одежда*, hereinafter – the Atlas), was prepared by the Institute of History of the Latvian SSR Academy of Sciences. The 1986 Russian-language edition of the Atlas became the most extensive scientific publication on traditional clothing in the Baltic region during the Soviet period. Although Soviet ideological constraints subordinated scholarly inquiry to political interests, framing it within historical materialism as the dominant research doctrine and the Marxist–Leninist interpretation of history, the Atlas nonetheless primarily aimed to document and map elements of traditional culture. The publication consists of two parts: a theoretical study, which includes a subsection on belt research, and an appendix containing 70 maps.

The methodology for compiling the *Historical-Ethnographic Atlas of the Baltic Peoples* required the classification of traditional cultural phenomena and the determination of their territorial and chronological boundaries, resulting in a comprehensive mapping of cultural features. In addition to depicting elements of traditional culture and their distribution, the maps were also intended to illustrate the dynamics of change driven by urbanization, industrialization, and other historical factors. To fulfil this objective, extensive research was undertaken, including large-scale expeditions to examine the ethnic history of the Baltic peoples and their cultural ties with the Slavic world [Брук et al. 1985: 7]. Soviet ethnographers primarily focused on material culture, as well as the study of ways of life, livelihoods, and traditional values that aligned with the ideology of collectivism. The significance of researching traditional clothing was justified by the notion that folk art fundamentally represented the artistic expression of the working class – peasants and Soviet collective farmers [Slava 1969a: 242–243).

The chief editor of all Atlas volumes was Lyudmila Terentjeva (*Людмила Николаевна Терентьева,* 1910–1982), deputy director of the Miklukho-Maclay Institute of Ethnography of the USSR Academy of Sciences, who supervised the work of Baltic ethnographers. The editor of the Clothing volume and the author of the Latvian textual material was ethnographer Mirdza Slava (1924–2001). Among the editors were also Saulvedis Cimermanis (1929–2022), head of the Department of Ethnography at the Institute of History of the Latvian Academy of Sciences (1971–1995), and ethnographer Ingrida Leinasare (1929–2004). The co-authors of the Atlas

subsection on belt usage in the Baltic region were Estonian ethnographer and long-time Senior collections manager of the Estonian National Museum Eevi Astel (1938–2025), as well as Lithuanian ethnographers Vida Kulikauskienė (1933–2023) and Marija Miliuvienė (1931–2018, formerly Mastonytė), who, like Slava, specialized in the study of traditional clothing in their respective countries.

The creation of the Atlas was a politically and ideologically complex endeavour that, including all expeditions, spanned more than 20 years. Ethnographer Linda Dumpe (1930–2024), one of the researchers for the Atlas volume *Agriculture*, in 1975 wrote in the journal *Zinātne un tehnika (Science and Technology)* that the work on the Atlas was essentially completed and would soon be published [Dumpe 1975: 17–22]. She also acknowledged the research conducted in Latvia during the 1920s and 1930s, emphasizing that without this foundational material, the study would not have progressed as smoothly. Notably, she mentioned that 80 maps had been prepared for the Atlas volume on clothing. However, a decade later, the published version included only 70 maps. Cimermanis similarly wrote in the newspaper *Cīņa* in 1976 that the work was completed and that the editorial board was preparing the material for printing [Cimermanis 1976: 4]. He emphasized that the Atlas clearly demonstrated the cultural similarities and connections between Latvians and neighbouring peoples, countering claims of a "purely Latvian culture" and efforts to disregard historical ties with neighbouring Slavic peoples. Concluding his article, Cimermanis noted that a decision had been made to initiate the second phase of the Atlas, incorporating new, scientifically significant topics. From this moment, this process took another ten years.

Despite some revisions and omissions, and although needlework belts did not show direct connections to Slavic traditions, surprisingly they retained their place in the Atlas. It classifies belts as a common element of both men's and women's clothing, dividing them into six groups: woven, braided, knitted, fabric-based, leather, and metal belts [Брук et al. 1986: 122]. The first three groups identified as the oldest, richest in tradition, and most ethnically specific, thereby attracting scholarly attention. It is acknowledged that the materials, techniques, and ornamentation of woven belts exhibit remarkable similarity across the Baltic region. In contrast, fabric-based, leather, and metal belts are classified as genetically distinct, later developments, and non-traditional; therefore, they are depicted separately on Map No. 48 (Figure 3). The Atlas employs a 25 km^2 grid as the territorial unit, corresponding to the administrative divisions of the Baltic states at the end of the 19th century.

The Atlas states that needlework belts were evenly distributed throughout Estonia (except for the islands) and most of Latvia, while they were considered rare in Lithuania. In Estonia, simple striped textile belts and beadwork belts were equally prevalent, whereas woolwork belts accounted for only a fifth of the total. In Latvia,

beadwork belts were the most prevalent, primarily concentrated in the central regions of Vidzeme and Kurzeme, as well as in Zemgale. Woolwork belts were the second most common type, documented in southern Kurzeme, Zemgale, western Augšzeme, southeastern Vidzeme, and Latgale. Regarding the distribution in Latgale, it is important to note that the collection of the Latvian National Museum of History includes one woolwork belt (CVVM 13714), originating from Krustpils parish and acquired in 1952 from L. Dumbergs (Figure 4), whereas one men's fur belt drawing (LU LVI EMK E17 4701 zmt), documented during a 1959 ethnographic expedition in Kūku village, Krustpils parish, held in the Repository of Ethnographic Materials at the Institute of Latvian History, University of Latvia (Figure 5). In 1962, Krustpils was incorporated into Jēkabpils (now part of the Sēlija region). No other evidence of needlework belts has been found in southeastern Latvia.

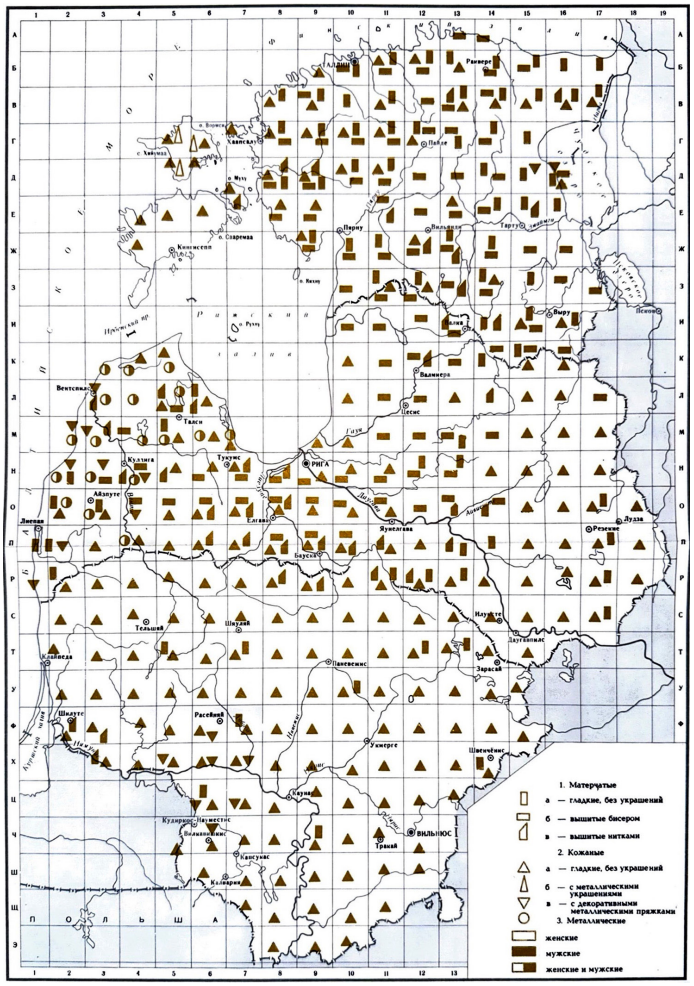

Figure. 3. Map No. 48. Textile, leather, and metal belts (second half of the 19th century). Historically Ethnographic Atlas of the Baltic Nations: Clothing (1986).

Figure. 4. Woolwork belt. Latvia. Krustpils parish. Wool, cotton, linen, leather, brass. Dimensions: 112 × 8.8 cm. 19th century. LNMH, CVVM 13714. Photo: J. Puķītis.

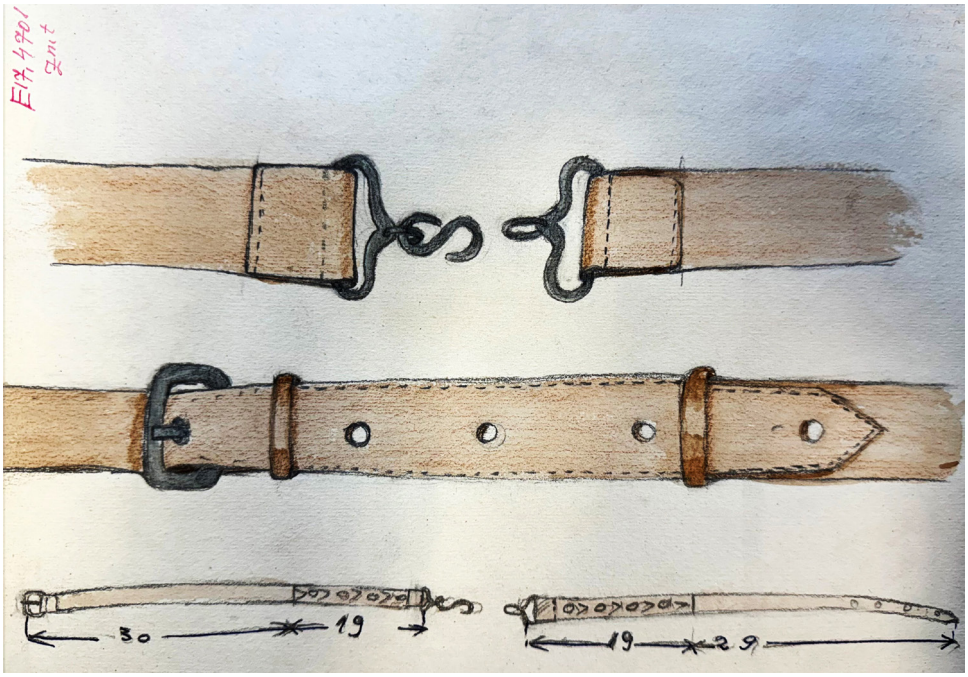

Figure. 5. Watercolour drawing. Men's fur belt. Krustpils district, Kūku village, Dreimaņi/Indriķēni. 1959. Information provided by: Dreimanis. Recorded and sketched by: M. Kazaka, REM ILH UL, E 17, 4701 zmt.

In Lithuania, only plain textile belts and woolwork belts have been documented in Klaipėda district, with no beadwork belts recorded in the Atlas. It has been concluded that beadwork belts emerged in the Baltic region in the second half of the 19th century, influenced by 18th century European fashion. The wealthier members of society acquired these belts for festive attire, while woolwork belts, being more affordable, were accessible to the peasantry [Брук et al. 1986: 126]. The cartographic review does not provide detailed information on the number of belts studied. Additionally, the sources of the belts' origins are described in general terms, referencing materials from the national history museums of the three countries. In conclusion, it is asserted that the Baltic region exemplifies how peoples from different ethnic communities, living under similar geographical conditions and having achieved comparable levels

of socio-economic development, can form a unified economic and cultural type [Брук et al. 1986: 162].

The ethnographers behind the Atlas: Studying needlework belts

Within the Ethnography Sector of the Academy of Sciences, each ethnographer specialized in a specific topic. Slava's contribution to the Atlas was closely connected to her 1955 doctoral dissertation, a comprehensive study of Latvian women's clothing and its ornamentation from the 18th to the 20th centuries. In accordance with Soviet academic regulations, the dissertation had to be written in Russian and defended in Moscow. Slava was among the first Latvian ethnographers to obtain a doctoral degree during the Soviet period [Karlsone 2019: 60]. Despite ideological requirements, such as citing the works of Marxist-Leninist classics and referencing the Programme of the Communist Party, Slava grounded her research in historical materials from museum collections, archives, as well as court records and lists of the estates of the deceased. Her articles in the journal *Arheoloģija un etnogrāfija* [Slava 1960, 1961a, 1963, 1973], as well as other publications, examine various aspects of traditional clothing history. She emphasized traditional costume as a source for ethnic history research, arguing that it could serve as an inexhaustible resource for cultivating artistic taste and aesthetic culture among the working class, as well as a foundation for artistic self-expression and applied craftsmanship [Slava 1966: 7–8].

The belt classification used in the Atlas can be compared with that proposed by Slava in her monograph *Latviešu tautas tērpi* (*Latvian Folk Costumes*, 1966), where she categorized belts into three primary groups based on material: 1) metal; 2) leather and 3) belts made of textiles, which are further divided into: woven, braided, knitted, and the belts embroidered with glass beads on a textile base (the so-called "acorn belts" – *zīļu jostas*) [Slava 1966: 55–57]. Although beadwork belts were recognized as a distinct category, the study did not elaborate on the topic. It was noted that beadwork belts became more widespread in the second half of the 19th century and were worn exclusively by men, who used them to gird their fur coats. The high cost of such belts made them a status symbol for wealthy householders. When analysing garment embellishments, Slava emphasized that the richness of decoration was influenced not only by the artisan's social status but also by their aesthetic ideals. For working people, beauty was associated with practicality, whereas the affluent classes equated it with luxury and prestige — often linked to the exploitation of labour [Slava 1966: 42]. Furthermore, Slava contributed to chapters on clothing history in *Latvian Ethnography (Latviešu etnogrāfija)* [Slava 1969a, 1969b], where she noted that in the late 19th century, wealthier peasants and merchants wore wide beadwork belts. Similarly, glass beads were used to decorate knitted bracelets, cuffs, groom's gloves, and pulse warmers, which were made from purchased yarn and worn over shirt cuffs.

The section on Estonian belts in the Atlas was written by ethnographer Eevi Astel, the most extensive researcher of needlework belts in the Baltic region. In 1983, a short article by Astel was included in the annual publication of the Estonian National Museum, summarizing data from a study of 73 beadwork belts in the collection of the State Ethnographic Museum of the Estonian SSR. This study was accompanied by three black-and-white photographs of the belts. Astel concluded that, unlike most Estonian traditional clothing, which was typically made at home, beadwork belts – or at least the materials for their production were usually purchased [Astel 1983: 104–106]. Beadwork belts were relatively rare, and their spread occurred relatively late.

In 1998, Astel's monograph entirely dedicated to Estonian belts was published [Astel 2017]. The book explores Estonian folk arts and crafts, offering a comprehensive overview of different belt types and their uses. It emphasizes the diversity of belt ornaments, colours, and techniques as part of Estonia's cultural heritage. Astel classified belts into eight groups based on material and manufacturing technique: plain belts, belts woven using various techniques, as well as knitted, braided, crocheted, knotted, embroidered, leather, and metal belts. The geographical distribution of each group was illustrated on maps. The only woolwork belt from Kodavere was included in the section on various textile belts, while beadwork belts were placed in the context of urban-style belts (*linlikud vööd*). These belts were commonly referred to as *helmevöö* in Estonian, though alternative names such as *helmesvöö, helmine vöö, elmine vöö, helmistsik vöö* were also recorded. An irregularly shaped belt was called *helme kurte* or *helmine rihm*.

Astel also stated that, in Estonia, beadwork belts were predominantly worn by young men on ceremonial occasions over outerwear such as long coats, fur coats, or regular coats, emphasizing the wearer's wealth and social status. The use of beaded belts in Estonia was first recorded in the mid-19th century, around 1840. Their popularity increased in the following decades, and they were worn both with traditional clothing and during the transition to urban fashion until the early 20th century. Beadwork belts were used across mainland Estonia, except for the islands, and their distribution was mapped [Astel 2017: 219]. These belts were characterized by intricate glass bead embroidery and were considered symbols of luxury and prestige. They were purchased from traveling merchants, at fairs, in cities, or made at home. Often, a bride would give a beadwork belt to her groom at their wedding or during the engagement, which is why these belts were frequently called wedding belts or groom's belts. Sometimes, initials and years were embroidered onto the belts (Figure 6). Astel linked the tradition of beadwork to exceptional craftsmanship, particularly evident in medieval church textiles and Renaissance art. In the first half of the 19th century, the Biedermeier style contributed to the popularity of this embroidery technique, which was used to decorate both clothing and everyday objects.

Figure. 6. Beadwork belt. Estonia. Tartu. Glass, cotton, linen, leather, metal. Dimensions: 135 × 8 cm. 1892. ERM 18860, Photo: Eesti Rahva Muuseum: http://www.muis.ee/en_GB/museaalview/647456

Beads were not only used for belts but also for adorning purses and tobacco pouches. The belts were typically made of brown tanned leather and linen fabric, embroidered with floral motifs such as flowers, leaves, and berries. The most common motif was grape leaves, though rose and animal head motifs were also found. The embroidery background was usually blue, though grey and light purple were also used. The belts varied in width from 4 to 9 centimetres and were often decorated with engraved copper or silver buckles. Astel concluded that, although beadwork belts are not directly related to folk art, they nonetheless deserve recognition as an important accessory in Estonian traditional clothing [Astel 2017: 227].

In Lithuania, the development of the Atlas required not only an in-depth analysis of the accumulated materials but also the collection of new data through expeditions, as archival materials were insufficient. The Lithuanian materials on belts for the Atlas were prepared by two ethnographers – Miliuvienė and Kulikauskienė. Before beginning her work on the Atlas, Miliuvienė studied Lithuanian traditional clothing, including elements of peasant men's clothing, hairstyles, shoes, and accessories [Miliuvienė et al. 1981, 1985]. Kulikauskienė conducted a more in-depth study of the history of Lithuanian traditional clothing. While working on the Atlas, she also developed her dissertation on *Lithuanian peasant men's clothing in the 19th and early 20th centuries* (Kulikauskienė 1975). Her study on Lithuanian men's clothing, covering the period from the 16th century to the early 20th century,

was published in 2018. It provides an analysis of men's clothing ensembles, examining the development of individual garments, their geographical distribution, tailoring methods, adornment, and ways of wearing [Kulikauskienė 2018]. Kulikauskienė notes that men in Lithuania predominantly wore leather belts. Luxurious fabric belts were also used. These had a leather base, while the surface was embroidered or interwoven with wool threads of various colours. Often featuring plant ornaments combined with geometric patterns. Beadwork belts, considered a sign of wealth, were worn by the wealthiest peasants. In the 19th century, these belts were found in Minor Lithuania, as well as in some regions of Samogitia and Aukštaitija. East Prussian Lithuanians referred to them as "Polish belts" [Kulikauskienė 2018: 249–252].

Conclusions

By placing the present findings alongside the interpretations recorded in the Historical-Ethnographic Atlas of the Baltic Peoples and other Soviet-era ethnographic studies, several key observations emerge. The markedly uneven representation of belts in Latvian, Estonian, and Lithuanian museum collections cannot be attributed solely to historical patterns of use. Rather, it reflects divergent research traditions, collecting practices, and the institutional priorities of museums and academies of sciences. This demonstrates the necessity of approaching collection data critically: absence in inventories should not be equated with absence in practice.

To fully understand the geographical distribution and regional characteristics of these belts in the 19th century, it is essential to situate them within the broader historical context of the Russian Empire. At that time, the region was administratively divided into governorates with varying degrees of autonomy and distinct cultural, linguistic, and social structures. According to Map No. 48 of the Atlas, needlework belts appear to have been relatively evenly distributed across the three Baltic governorates: the Governorate of Estonia *(Эстляндская губерния),* centred in Reval (now Tallinn) and covering northern Estonia; the Governorate of Livonia *(Лифляндская губерния)*, centred in Riga and encompassing southern Estonia and northeastern Latvia; and the Governorate of Courland *(Курляндская губерния)*, centred in Jelgava and covering Courland and Semigallia. These provinces retained a degree of autonomy until the late nineteenth century, including Baltic German self-governing institutions and the continued use of German in administration. By contrast, Latgale was part of the Vitebsk Governorate *(Витебская губерния),* and Lithuanian territories were administered within the Northwestern Krai (*Северо-Западный край*), encompassing the historic lands of the Grand Duchy of Lithuania. Such divergent administrative structures shaped patterns of cultural exchange and the development of local textile traditions, producing regionally differentiated dynamics of cultural change.

Communication and information networks were equally significant in shaping dress practices. The dissemination of European fashion trends, the growing accessibility of printed media, and increasing human mobility all had a profound impact on both the aesthetics of textile production and the meanings ascribed to dress. These processes unfolded alongside the socio-economic transformations following the abolition of serfdom, which occurred later in the Vitebsk Governorate and the Northwestern Krai than in the Baltic governorates of Estonia, Livonia, and Courland. This created distinct temporal rhythms in cultural exchange and the formation of material culture.

The comparative evidence also highlights the different capacities of ethnographic research traditions. Early expeditions in Estonia and Latvia between 1911 and the 1930s played a pivotal role in documenting regional textile practices. In Lithuania, however, expeditions conducted during the Soviet period recorded significantly fewer examples of needlework belts, largely because parts of this material culture had already disappeared, traditions had been discontinued, or their forms substantially transformed. Moreover, the Soviet system imposed selective criteria for ethnographic collecting, often filtered through ideological agendas.

The interpretation of belts was likewise shaped by scholarly frameworks. In the Soviet period, classification and mapping were primarily organized around material typologies that reinforced ideological narratives of cultural commonality across the Baltic. By contrast, the present study demonstrates that belts cannot be fully understood through typology alone. They also functioned as culturally charged objects: as gifts, as markers of masculinity, and as visible symbols of wealth. These roles transcend purely material analysis and highlight the social and symbolic dimensions of dress. More broadly, needlework belts reveal the interplay between local craft traditions, contemporary fashion, and industrial innovation. They exemplify how tradition and novelty intersected with socio-economic change and external cultural influences. Comparative analysis of museum collections and research approaches across the Baltic states shows that the documentation and interpretation of these objects are inseparable from each country's ethnographic traditions, the scale of its museum holdings, and the broader historical circumstances that shaped scholarly agendas.

Finally, the Atlas underscores the significance of collections assembled during early ethnographic expeditions and of the research conducted in the interwar period, when the foundations of ethnology were firmly established in the Baltic states. During the Soviet era, despite ideological constraints, ethnographers from Latvia, Lithuania, and Estonia contributed to an ambitious cartographic project that included embroidered belts. Leading scholars of clothing history – Slava, Astel, and Kulikauskienė – were central contributors, situating the study of belts within broader

academic discourse. Thus, embroidered belts are more than functional accessories: they represent nodes of cultural meaning, linking local craft traditions, social identities, and broader transnational currents. Their study not only illuminates the history of men's clothing but also reflects the development of ethnographic scholarship and the cultural-historical heritage of each Baltic country.

Acknowledgment

This study has been supported by a grant from the Fundamental and Applied Research Programme project "Ethnographer, Society, and Art: Symbiosis of Ethnology and Art and Discourse of the Soviet Colonialism in Latvia", No. lzp-2023/1-0052. Funded by Latvian Council of Science.

Sources

Belts from: The Clothing and Textiles Collection of the Ethnography Department of the Latvian National Museum of History:

Inv. No. CVVM 5018. Beadwork belt. Valmiera district, Valmiera parish. Glass, wool, cotton, leather, metal. Dimensions: 105 × 5 cm.

Inv. No. CVVM 5019. Woolwork belt. Valmiera district, Valmiera parish. Wool, cotton, leather, metal. Dimensions: 120.5 (118) × 7.5 cm.

10.4. Inv. No. CVVM 5020. Beadwork belt. Valmiera district, Valmiera parish. Glass, cotton, leather, brass. Dimensions: 115.5 (113) × 5.5 cm.

Inv. No. CVVM 13690. Woolwork belt. Jelgava. Wool, cotton, linen, leather, brass. Dimensions: 113 × 6 cm.

Inv. No. CVVM 13692. Beadwork belt. Jelgava. Glass, wool, cotton, leather, metal, brass. Dimensions: 92 (84) × 5 (3) cm.

Inv. No. CVVM 13693. Beadwork belt. Jelgava. Glass, wool, cotton, leather, metal. Dimensions: 119.5x7 cm.

Inv. No. CVVM 13697. Woolwork belt. Jelgava district, Jelgava parish, Jelgava. Wool, cotton, leather, brass. Dimensions: 83 (77) × 3.5 cm.

Inv. No. CVVM 13714. Woolwork belt. Jēkabpils county, Krustpils parish. Wool, cotton, linen, leather, brass. Dimensions: 112 (102,5) × 8,8 cm.

Inv. No. CVVM 13717. Woolwork belt. Jelgava. Wool, cotton, leather, metal. Dimensions: 122 × 8 cm.

Inv. No. CVVM 13726. Woolwork belt. Bauska district, Panemunė parish, Jaunzemji. Wool, cotton, linen, leather, brass. Dimensions: 170 × 7 cm. 1860.

Inv. No. CVVM 13727. Woolwork belt. Jelgava. Wool, cotton, linen, leather, metal. Dimensions: 139.5 (105) × 7.5 (2) cm.

Inv. No. CVVM 13731. Beadwork belt. Jelgava. Glass, cotton, linen, leather, brass. Dimensions: 120 × 5 cm.

Inv. No. CVVM 13732. Beadwork belt. Valkas district, Veclaicene parish, Metumi. Glass, cotton, linen, leather, metal. Dimensions: 109 × 5 cm. 1882.

Inv. No. CVVM 13736. Beadwork belt. Latvia. Glass, cotton, linen, leather, brass. Dimensions: 78 (75) × 2.5 (3) cm.

Inv. No. CVVM 13758. Beadwork belt. Jelgava district, Jelgava parish, Jelgava. Glass, cotton, linen, leather, silver, brass, metal. Dimensions: 96 × 6.8 cm.

Inv. No. CVVM 13760. Part of a beadwork belt. Jelgava district, Jelgava parish, Jelgava. Glass, cotton, leather, brass. Dimensions: 33 × 3 cm.

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E 17, 4701 zmt. Description sheet. Men's fur belt. Krustpils District, Kūku Village, Dreimaņi/Indriķēni. Information provided by: Dreimanis. Recorded and sketched by: M. Kazaka, 1 July 1959.

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NAMING PRACTICES AND CULTURAL PERCEPTIONS OF SWASTIKA ORNAMENTS IN LATVIA AND LITHUANIA

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Abstract

A symbol's name, being an important part of the symbol itself, can be crucial in establishing the context. The swastika is a globally recognised yet ambivalent symbol appearing in various cultural contexts. In Latvian, the symbol is commonly known as *ugunskrusts* ("Firecross"), which helps to distance it from associations with Nazi ideology. Alongside *ugunskrusts*, numerous other names such as *Pērkona krusts* ("Thunder Cross"), *Laimas krusts* ("Laima's Cross"), *Laimes krusts* ("*Cross of Luck*"), and others, reinforce the perception of the swastika as a locally significant and benevolent cultural ornament. However, in Lithuania the ornament is mostly called *svastika* and is generally viewed more negatively, despite its frequent presence in archaeological and ethnographic contexts. This study through descriptive, comparative, semiotic, corpus analysis methods, and questionnaires examines the differences in naming conventions between Latvia and Lithuania. Additionally, the research addresses the significance of the researcher's positionality, arguing for the necessity of an emic approach when studying culturally meaningful symbols within one's own cultural framework, despite the inherent subjectivity this perspective can introduce.

Keywords: *Baltic languages, corpus linguistics, semiotics, emic and etic research, cultural identity*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.604

ISSN 2500-9974

CULTURE CROSSROADS

Introduction

The swastika is undoubtedly one of the most pronounced traditional Latvian ornaments: starting with archaeological evidence from all tribes inhabiting the territory of Latvia where swastikas often decorate the most valuable possessions [Zemītis 2004: 59–62], and in later centuries it is also present in ethnographic heritage from Lielvārde, Krustpils, Eastern Vidzeme, Southern Kurzeme, and Augšzeme [Rozenberga, Zemītis 1991: 12]. In many parts of the world, swastika represents luck, success, and light, while elsewhere, it is associated with evil and suffering – a cruel and cynical contradiction, given that the word *svastika* in Sanskrit conveys a positive meaning. In the Baltic region, where the swastika has been present since the Early Iron Age and where people suffered greatly under Nazi terror in the 20th century, these conflicting interpretations collide and create ongoing debates. While a part of the society tries to avoid the symbol entirely, some actively seek to restore its reputation through art and research. In this context, various narratives attached to the symbol's different names become particularly significant and exploring the Lithuanian names of swastika for a Latvian scholar reveals previously unseen aspects of an already familiar symbol.

Many researchers avoid addressing the topic of the swastika due to fear of public condemnation. As academic literature on this topic is limited, the void is filled with esoteric interpretations or theories of dubious origin and quality. Lithuanian ethnologist Vytautas Tumėnas emphasises that the vitality of a culture depends on it understanding, translating and describing its own concepts, which also highlights the importance of the emic perspective. Without sufficiently understanding the local symbols and meanings, traditional culture becomes merely a superficial projection of the past onto the present, losing its capacity to inspire meaningful contemporary creativity [Tumėnas 2015: 105–106]. As the practice of traditions within communities has declined, the importance of research in preserving and disseminating this knowledge has increased.

In Latvia the tradition of *latvju raksti* ("Latvian patterns") includes specific terminology and interpretation of traditional ornaments that imbue them with magical power [Ķenga 2024: 30]. In the case of the swastika, terminology also helps to compartmentalize: *svastika* mostly refers to the international or the nazi symbol, while *ugunskrusts* ("Firecross") is used for the local benevolent symbol [Ūdre 2023: 12]. In contrast, Lithuania lacks this tradition; terminology is less emphasized, and the swastika has few alternate names shaping a different perception of the symbol. The aim of this paper is to compile a systematic review of swastika denominations in Latvia and Lithuania for the first time. This task also offers a compelling insight into the importance of linguistic labels in separating symbols and contexts. The emic perspective can be very helpful for formulating culturally grounded questions and uncovering insights that might otherwise go unnoticed.

The emic/etic perspective

This distinction was established by the American linguist and anthropologist Kenneth Lee Pike, who differentiated between the phon*emic* and phon*etic* perceptions of language, noting that phonemic perception is characterised by sound contrasts recognised mentally by native speakers, while phonetic perception refers to objective nuances in sound perceivable by external researchers [Markee 2012]. These terms, with slight variations in meaning, are also applied beyond linguistics – in anthropology and ethnology – where *emic* signifies an internal or insider perspective, and *etic* denotes an external or outsider viewpoint. Thus, emic/etic distinctions indicate two different methods of observation and description, depending on the observer's position. Traditionally qualitative research can be seen as emic and quantitative research – as etic. As ethnographic research includes both types of methodology, it is not exclusively emic or etic.

When researching elements tied to national identity, objectivity becomes crucial. An external perspective may aid neutrality by reducing cultural bias, while an insider view offers deeper access to context and nuance. In Latvia, ornament research has typically been emic, relying on local sources such as folk songs (*dainas*) and local interpretations [Brastiņš 1923; Celms 2011]. In contrast, Lithuanian studies tend to follow an etic approach, involving external, perspectives [Beresnevičius 1992; Šimkus 2019].

A global or a local symbol?

Speculating about the meanings of ancient symbols is always problematic – associations are mostly drawn from the current culture which is very different to the culture that shaped the original symbol. Interpretations, strengthened through academic or popular discourse, are still just interpretations therefore relying on them as irrefutable is problematic even though this approach is common [Zemītis 2004: 9]. The swastika could be called a "universal symbol" in the sense that it is can be found all over the world and it can symbolize a wide array of things – light, dynamism, luck, and more. But can the swastika in Nazism be considered the same symbol as the swastika in Hinduism or traditional Latvian art? A symbol is not defined by its visual form alone (representamen); it also includes the underlying original concept it signifies (referent), and the interpretation it evokes (interpretant). When two of these three aspects – the form, the meaning, and the interpretation – differ, it is reasonable to treat them as distinct symbols, even if they look the same.

Along with other traditional ornaments, the swastika is mostly seen as an essential part of national identity in Latvia even if some members of society reject it [Ūdre 2018: 123]. Because the swastika is not unique to Latvian or even Baltic culture, some claim it cannot be categorized as *tautisks* ("folk/national") [Šmits 1937: 52]. But at the same time cultural boundaries are not rigid, and no culture possesses a set

of entirely unique elements that are absent elsewhere. Defining *folk/national* strictly as something found exclusively within a single nation, paradoxically, leaves nearly all cultures without most of their folk symbols.

Previous research

At the turn of the 19th–20th centuries, interest in Sanskrit and Indo-European symbols grew alongside comparative linguistics and semiotics. *Swastika* had become the most widely used term for an equilateral cross with four arms bent at 90 degrees in the same direction. A major global study on swastikas was published already in the end of the 19th century [Wilson 1896] but it did not include Baltic, Finnic and Slavic variants.

In Latvia and Lithuania, interest in traditional ornaments grew notably during the 1920s and 1930s. Latvian scholars can be divided into a "mythological school" (Ernests Brastiņš, Arvīds Brastiņš, Jēkabs Bīne and others) linking ornaments and swastika to mythology, and an "ethnographic school" (such as Eduards Paegle, Arvīds Dzērvītis and Jānis Niedre), which rather focused on its form and usage. These differing approaches led to multiple name variations. In contrast, Lithuanian research emphasized ornamentation as a whole, often overlooking individual names [Anča 2023: 245]. Also, instead of linking swastika to deities, it is mostly seen as a general symbol of light. Swastika has also been explored from an archaeological perspective but the opinions in Latvia and Lithuania vary. Latvian scholars date the first swastikas with the 3rd–4th century and view them as a significant part of Baltic heritage, common among the elite of the society [Zemītis 2004: 62]. There are even claims that Latvia has the world's greatest swastika variety, though without solid archaeological proof [Brastiņš 1923: 72]. Lithuanians view these 3rd–4th century samples as mere Roman-influenced copies, consciously crafted swastikas emerging only in the 5th–7th century. They are considered to be minor in the Baltic art, except in 12th–13th century Latvian textiles [Bliujienė 1999; 2000]. Recent studies on swastika semiotics and national heritage include works by V. Tumėnas [Tumėnas 2015; 1992] and Digne Ūdre [Ūdre 2023; 2018] who also explores swastika as a part of the Latvian folk ornament revival in her doctoral thesis [Ūdre-Lielbārde 2024].

The process and criteria of name selection

For the purpose of the present study, swastika denominations were extracted from publications and analysed in language corpora, considering frequency and connotations, with survey data supplementing the findings. Sources include Latvian and Lithuanian periodicals that were available online, academic works and monographs from the late 19th century to today.

Only the terms clearly referring to the swastika – either as synonyms or as captions under identifiable images – were included. Latvian and Lithuanian terms

were analysed separately due to differences in their perception, usage, and origins. The analysis used two balanced and comparable corpora: the Latvian Balanced Corpus (LVK2022) and Vytautas Magnus University's Corpus of Contemporary Lithuanian Language (DLKT), both of which are approximately of the same age, size and composition, therefore they are comparable. Corpus excerpts helped to identify the connotations of each name. Because these terms are relatively rare, a manual review was manageable.

As an illustrative example this study also includes surveys that were conducted in spring 2024. They targeted Latvian Baltistics students (19 respondents), Lithuanian Baltistics students (11 respondents), and international respondents (22 in total) from Czechia, Japan, Ukraine, Germany, USA, Canada and more. Participants identified synonyms and attributed names and connotations to six swastika shapes. Survey results can be viewed in Figures 4–5. Due to the small sample size, they should not be considered as primary data.

Corpora results

The most common names for swastika found in publications were: *svastika*, *ugunskrusts* ("fire cross"), *pērkonkrusts* (also *Pērkona krusts*) ('thunder cross'), *kāškrusts* ("hook cross"), *zaru krusts* ("cross of branches"), and *Laimas krusts* ("Laima's cross") or *laimes krusts* ("cross of luck") in Latvian, and in Lithuanian – *svastika*, *sūkurėlis* ("little whirl"), *ugnies kryžius* ("fire cross"), *saulės ženklas* ("sign of sun"), and *kablių kryžius* ("hook cross"), but not all of the names found in publications were also present in the corpora. As the Latvian corpus LVK2022 demonstrates (Figure 1), *ugunskrusts* is by far the most popular. Even excluding the 60 cases when it was used to name a political organization and not the symbol, *ugunskrusts* is still the most frequently used, followed by *svastika*. It is also visible that in most cases these names have been used neutrally. A negative connotation was concluded when words related to antisemitism, Nazism, hate, crime, violence etc. were found in the excerpt provided by the corpus.

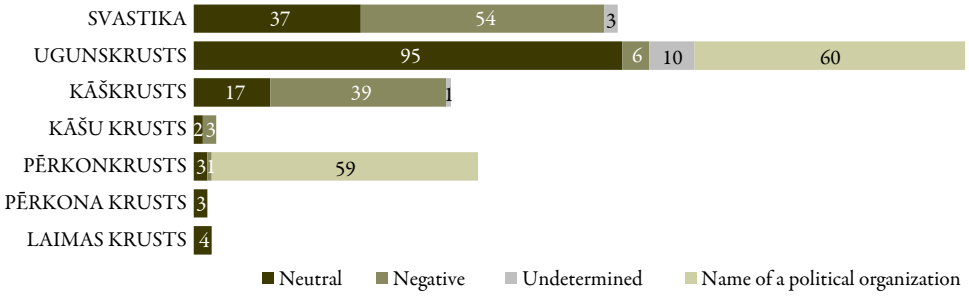


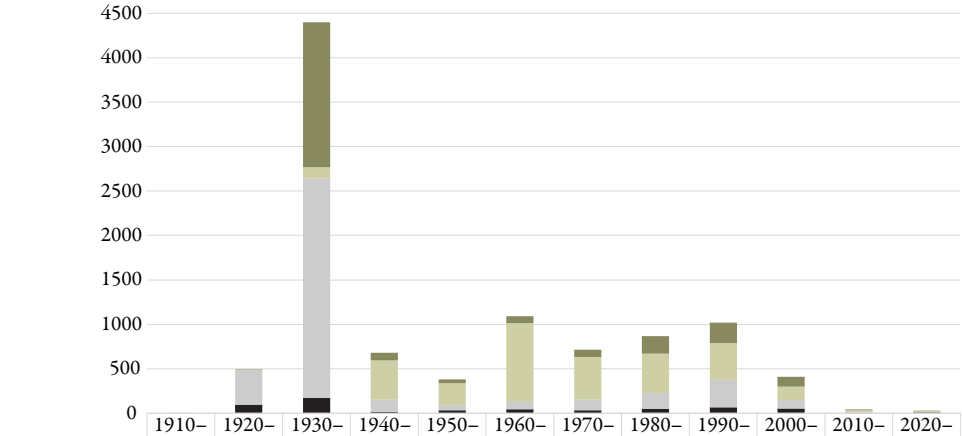
Figure 1. The usage of Latvian swastika names in LVK2022.

Figure 2. The usage of Lithuanian swastika names in DLKT.

In contrast, the results of the Lithuanian corpus DLKT paints a very different picture (Figure 2). Even though both corpora match each other in size and composition, much fewer denominations were found in DLKT. *Svastika* was the only name to be used regularly and it mostly appeared in negative connotation. Other denominations only appear sporadically.

Latvian names of the swastika

In Latvia, swastika ornaments have many name variations, and there is no consensus on how best to refer to them. Discussions on this topic have been ongoing for decades, resulting in scientific and sometimes also personal disputes. Periodika.lv (digital archive of Latvian periodicals) offers statistical data on the usage of these names in each decade, which provides a convenient platform for examining the chronology of these names (Figure 3).



	1910–1919	1920–1929	1930–1939	1940–1949	1950–1959	1960–1969	1970–1979	1980–1989	1990–1999	2000–2009	2010–2019	2020–2029
Laimas krusts, laimes krusts						5	3	7	9	2		
Pērkonkrusts, pērkona krusts		3	1630	85	39	72	73	191	220	104	10	6
Kāškrusts		2	128	445	248	885	483	439	415	152	20	9
Ugunskrusts	2	390	2468	136	58	80	116	182	307	93	9	5
Sauvastika		3	1		2	3	2	1	1	1		
Svastika		94	170	16	32	44	34	47	68	54	6	8

Figure 3. Usage of swastika names in Latvian periodicals. Periodika.lv data.

***Svastika* and *sauvastika*.** *Svastika* (from *svasti* (स्वस्ति)) in Sanskrit has multiple meanings, but in this study's context, the most relevant is "a kind of mystical cross or mark on persons and things to denote good luck (it is shaped like a Greek cross with the extremities of the four arms bent round in the same direction" [Monier-Williams 1899: 1283]. In Latvian outside the field of semiotics and cultural history this name tends to have a negative connotation–this is indicated by both: the analysis of the language corpus, where it often appears in reports on conflicts, crimes, and vandalism, and the responses obtained in the survey.

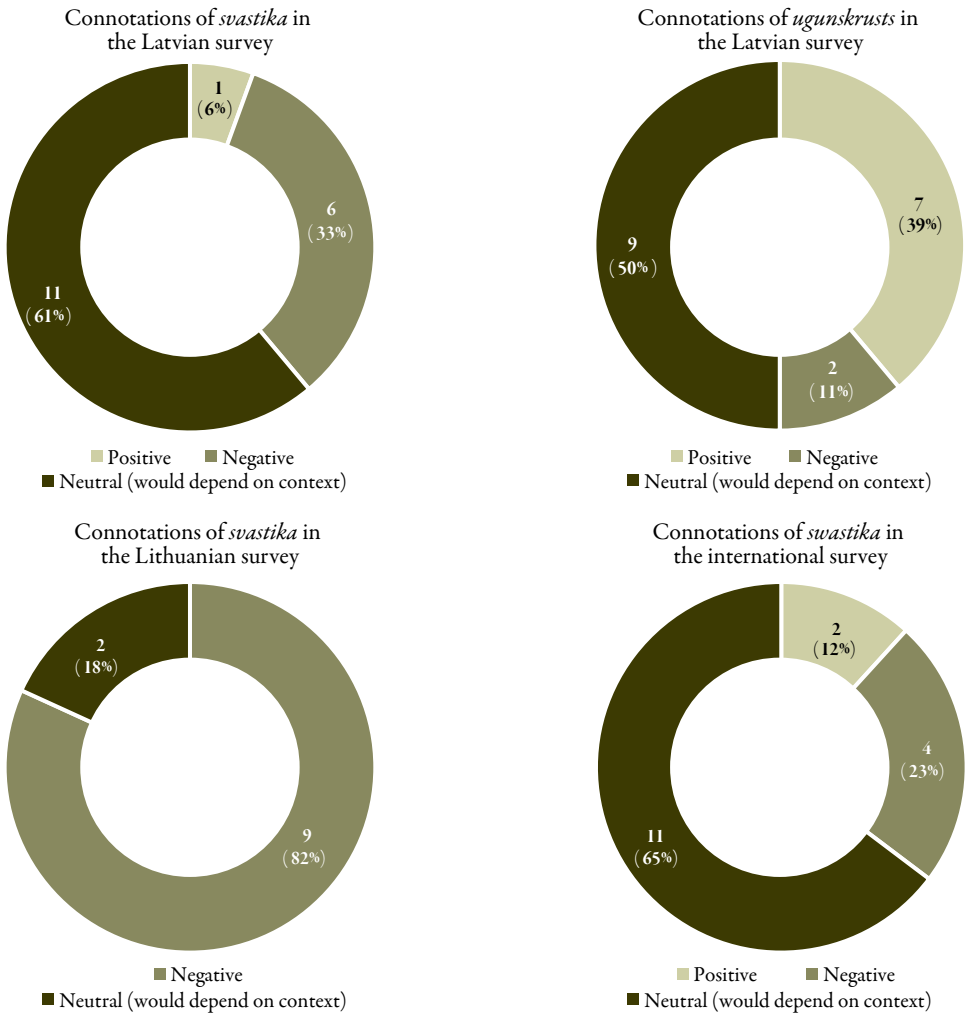


Figure 4. Connotations of svastika, ugunskrusts and swastika in the Latvian, Lithuanian and international respondent groups.

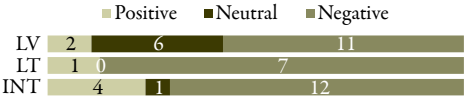
Periodika.lv confirms the use of *svastika* as early as 1922 when it was used to quote the title of T. Wilson's study but the actual term used in the article was *uguns krusts* [Sudmalis 1922]. Along with other examples this article illustrates how *uguns krusts* (or *ugunskrusts*) is used for local swastikas, reserving *svastika* for international contexts [Aberbergs 1924; 16; E. Brastiņš 1923: 71–72].

The usage of *svastika* also relates to the shape of the ornament. *Svastika* typically refers to single-armed forms, while more complex designs are called differently [Paegle 1923: 89]. This distinction is also confirmed by corpus analysis and survey responses. Some authors also believe that *svastika* refers specifically to a cross with arms facing right and a cross with arms facing in the opposite direction should be called *sauvastika* [Wilson 1899: 773; Paegle 1923: 89] but this term was already ambiguous in the 19th century. T. Wilson notes that *sauvastika* was mentioned by the German linguist Max Müller and the French orientalist Eugène Burnouf but without citing any reliable sources [Wilson 1896: 767]. In Latvian, *sauvastika* is used by E. Paegle, though he notes that such symbols are generally referred to as *svastikas* in practice [Paegle 1923: 89; 1925: 315]. Interestingly, a common misconception among Latvians and Lithuanians claims that folk swastikas always face a "positive" direction, while the opposite "negative" one is linked to Nazi use. Though this idea hasn't been confirmed in written sources, it repeatedly arises in discussions after lectures and conference sessions. In reality, archaeological and ethnographic examples face both directions, as also shown in Figure 5.

***Krusts* and *krustiņš*.** Simply meaning ("cross" and "little cross") these names are very frequent in folklore texts, although it is difficult to tell when they refer to swastikas specifically. Having such broad meanings, they were not analysed in the corpus but they are often used in ethnographic publications to name various crosses, including swastikas.

Krusts and *krustiņš* have sparked discord among Latvian ornament researchers. Although these names have been recorded in ethnographic field work [Dzērvītis 1925: 339] followers of the mythological school find them too simple and prefer names linked to deities such as *pērkonkrusts* ("Cross of Pērkons") or *Laimas krusts* ("Cross of Laima") even though ethnographic and folklore materials do not mention such names. Dismissively calling them *kaķpēdiņu nosaukumi* ("cat paw names") the mythological school followers suggest that them to be a newer layer of folklore and respecting national heritage requires looking beyond them [A. Brastiņš 1982: 2046; Grīna, Grīns 1987: 1899]. A. Brastiņš even questions the reliability of these folk ornament names but in that case, for consistency, the same scepticism should also be applied to his primary source – *dainas* – which were collected using the same methodology and face the same limitations.

Swastika in textile.10–12th century. Latvia.
Zemītis, G. (2004). *Ornaments un simbols Latvijas aizvēsturē*, p. 183

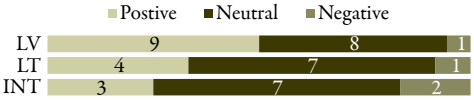


NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: svastika – 10; ugunskrusts – 5; kāškrusts – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: svastika – 9; saulės ženklas – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 11 ; No – 0

Swastika in textile.10–12th century. Latvia.
Zemītis, G. (2004). *Ornaments un simbols Latvijas aizvēsturē*, p. 183

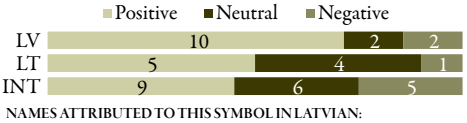


NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: ugunskrusts – 9; kāšu krusts – 2; auseklītis – 1; Pērkona krusts – 1; svastika – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: sūkurėlis – 2; svastika – 1; laužta svastika – 1; pasaulio ženklas – 1; dobilas – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 6 ; No – 7

Swastika in textile.n.d. Latvia.
Celms V. (2007). *Latvju raksts un zīmes*, p. 201

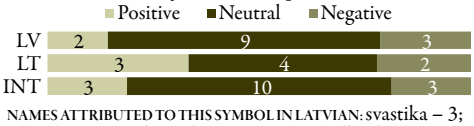


NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: ugunskrusts – 5; Pērkona krusts / pērkonkrusts – 5; svastika – 1; krustiņš – 1; dreiļa raksts – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: sūkurys – 1, ugnies kryžius – 1; medžio šakos – 1; šakotas kryžius – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 4; No – 9

Swastika in bronze.10–12th century. Latvia.
Zemītis G. (2004). *Ornaments un simbols Latvijas aizvēsturē*, p. 183

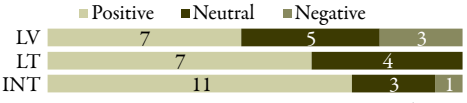


NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: svastika – 3; ugunskrusts – 2; līniju lociņu zīme – 1; zalkša krusts – 1; krustiņš – 1; kāšu krusts – 1; čūsku zīme – 1; zalkša krusts – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: svastika – 2, sūkurys – 1; sūkurėlis – 1; sukutis – 1; klouno kepurėle – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 7; No – 6

Swastika brooch. 9th century. Lithuania
Bliujienė, A. (2000). *Universalusis svastikos simbolis baltų medžiagoje,* p. 23

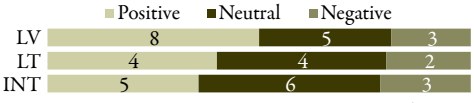


NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: svastika – 3; ugunskrusts – 1; Laimas krusts – 1; čūsku/pūķu zīme – 1; čūsku aplis – 1; zalkša krusts – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: sūkurys – 1, sūkurėlis – 1; žalčio kryžius – 1; gyvačių ratas – 1;svastika – 1; Laimės ratas – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 6; No – 7

Swastika on an Easter egg. n.d. Lithuania
Emaitytė, E. (1996). *Kosminis kiaušinis, lietuvių margutis ir svastika*, p. 9



NAMES ATTRIBUTED TO THIS SYMBOL IN LATVIAN: svastika – 2; Laimas krusts – 2; skuju raksts – 1; krustiņš – 1; ugunskrusts – 1; kāškrusts – 1

NAMES ATTRIBUTED TO THIS SYMBOL IN LITHUANIAN: svastika – 1; eglės kryžius – 1; eglišakių kryžius – 1; vainikėlis – 1; gyvate – 1; pušinis kryžius (pušinė svastika) – 1; paparčio kryžius/svastika – 1

INTERNATIONAL GROUP – WOULD YOU CONSIDER THIS A SWASTIKA: Yes – 7; No – 7

Figure 5. Survey responses.

Ugunskrusts. This is the most popular name for swastika ornaments nowadays and is included in most Latvian dictionaries as a synonym of *svastika*. On Periodika.lv its earliest mention in relation to swastikas can be found in a 1914 article [Švābe 1914] in which the author does not introduce or explain the origin of the term, which suggests that the term might have already been common at the time and required no explanation. It may have German origins, as A. Švābe cites German sources and *Feuerkreuz* (Fire cross' in German) appears already in 19th century sources, though unrelated to folk art.

Usage of *ugunskrusts* surged in the 1920s–30s when amid heightened ethnographic and archaeological interest the symbol was especially popular in uniforms, monuments, and other developing fields of applied design. With all of its popularity, the society seems to have been interested in the name as well – in 1926 *Latvijas Saule* published a call urging readers to share information on the use and meaning of *ugunskrusts* [Paegle 1926].

Another reason for the frequent use of *ugunskrusts* was the political organization bearing this name. The Latvian National Union *Ugunskrusts* officially ran only a few months, but it published its own newspaper and was frequently mentioned due to its loud activities and confrontations. The name was probably chosen because at the time it was seen as a singularly Baltic symbol. This myth was cultivated by such artworks as Pāvils Gruzns' play *Ugunskrusta zemē* ("In the Land of the Fire Cross") and it later further contributed to the use of swastika in political contexts [Ūdre 2018: 133, 135]. Neither this organization, nor its successor LNA *Pērkoņkrusts* focused on explaining the symbol or its name.

After the 1930s, *ugunskrusts* usage declined due to Latvia's occupation by the USSR but before resurfacing in Latvia in the late 1980s, it sowed a great deal of discord among researchers in exile. Despite being in use since at least 1914, some dismissed it as an invented post-World War I term [Dunsdorfs 1982: 204] but *Dievturi* attributed it to an entirely different graphic symbol.

Dievturi is a religious movement that was established by E. Brastiņš in the 1920s and continued to function in exile. It sought to reconstruct the pre-Christian local religion and devoted a lot of effort to conceptualize traditional ornament through the approach of the "mythological school". In the 1920s, E. Brastiņš still called the swastika *ugunskrusts* [E. Brastiņš 1923], however, by 1932 he applied this name to a different symbol – a cross with crossed arms, also known as *krustu krusts* ("Cross of Crosses") – and argued that calling the swastika *ugunskrusts* was a mistake [E. Brastiņš 1932: 124]. He based this change on folklore citing three customs [LFK: 150, 1079; 1080; 1085] that link this shape of cross to fire but as proof for any concrete conclusions it is hardly sufficient. The cross is unnamed in these accounts and used to extinguish, not ignite, fire – suggesting a general protective function of

all crosses rather than a specific association. Notably, all three examples come from the same informant, further limiting their reliability.

Ironically, *ugunskrusts* gained popularity largely due to Brastiņš himself. His earlier work *Latviešu ornamentika*, which still used *ugunskrusts* for the swastika, was immensely popular in exile schools [Strausa 1987]. The Cross of Crosses is regarded as the main symbol of *Dievturi* faith, therefore E. Brastiņš and other followers are adamant about calling it *ugunskrusts* and referring to swastikas by other names. Meanwhile others continued to use *ugunskrusts* relying on tradition which causes constant clashes between the opposing sides. Nowadays, *Dievturi* have accepted the term *ugunskrusts* for swastika among others.

It is also noteworthy that prominent archaeologists, such as Guntis Zemītis, use *ugunskrusts* in academic texts and the broader society makes a clear distinction between *ugunskrusts* and *svastika*: the former refers to the symbol in a Baltic context and carries a neutral or a positive meaning, whereas the latter denotes Nazi symbolism and has a negative connotation. This distinction was also documented by D. Ūdre in an interview [Ūdre 2023: 13], and can also be seen in a sample from LVK2022: *Saldeniekus satrauc Trešā reiha simbols, pašvaldība mierina – tas ir ugunskrusts* ("Inhabitants of Saldus are concerned about a Third Reich symbol, municipality reassures – it's an *ugunskrusts*"). Not counting the instances referring to the political organization, *ugunskrusts* appears in LVK2022 mostly in neutral connotation. A similar pattern emerges from survey responses.

***Kāškrusts* or *kāšu krusts*.** These names are direct translations of the German *Hakenkreuz* ("hook cross") and have a more distinct link to Nazi ideology. By the late 19th century, the swastika gained popularity in Germany when Heinrich Schliemann observed similarities between the swastikas in Troy and traditional German ornaments. This became material for pseudoscientific studies aimed at proving an affiliation with a supposed superior Aryan culture [Oesterdiekhoff 2007]. It should be noted though, that swastikas are widespread beyond Indo-European cultures and also in Latvia, the earliest known swastikas have been found in Baltic Finnic regions [Zemītis 2004: 51]. The term is very popular (and very negative) during the occupation time from 1940 to 1990 when describing the horrors of Nazism was a popular topic. These names sometimes also appear in articles about ornaments but they are never used as the main term. An exception to this is the article *Uguns krusts* by P. Šmits, in which the author rejects the idea of cross being native to Latvian culture, arguing that the trend was imported from Germany [Šmits 1922]. The usage of *kāšu krusts* here seems to be personally motived to prove the author's point. Another interesting use of *kāšu krusts* can be seen in an article by Valdis Klētnieks, where he proposes to use this term to denominate a symbol commonly known as *jumis* (a sort of an inverted W) [Klētnieks 1959: 307]. *Kāškrusts* and *kāšu krusts* also appear

in the LVK2022 corpus and in most instances carry a negative connotation directly linked to Nazi ideology and vandalism. In the survey, most Latvian respondents recognized *kāškrusts* as one of the Latvian names for the swastika, and some also used it to refer to the examples provided in the survey.

***Pērkonkrusts* or *Pērkona krusts*.** Like *ugunskrusts*, *pērkonkrusts* refers to both an ornament and a political organization. Many Latvian authors associate the swastika with Pērkons (God of Thunder) based on the findings of the Swedish archaeologist Oscar Montelius [E. Brastiņš 1923; Švābe 1914: 284; Sudmalis 1922]. While a connection between thunder and crosses can be observed in folk beliefs it is unclear when they refer to a swastika specifically, it can also be just a simple cross, or the Christian protective gesture. A clearer connection between swastika and thunder is noted in Lithuanian sources [Vaitkevičius 2020].

In the LVK2022, most instances of *pērkonkrusts* (94%) refer to the political organization LNA *Pērkoņkrusts* (successor of LNA *Ugunskrusts*) and Periodika.lv shows particularly frequent usage between 1930 and 1939 when the organization was active. A slight resurgence occurred in the 1980s–2000s, mainly in a political context, driven by academic interest and availability of new information [Krēsliņš 2005: 41]. The survey responses list *pērkonkrusts* as one of swastika's names and in one case it attributed to a specific form. In relation to shape, the Latvian Wikipedia article *Svastika* claims that *Laimas krusts* rotates in the opposite direction to *Pērkona krusts*, though no source is cited. A. Brastiņš, in explaining the use of *Laimes krusts* provided examples of swastikas rotating in both directions [A. Brastiņš 1978: 445]. It can be concluded that *pērkonkrusts* as name for the swastika was mostly used by researchers who leaned into the ideas of *Dievturi*, however, this name has not been able overtake *ugunskrusts* in this regard.

***Laimas krusts* and *laimes krusts*.** Both name variants appeared around the same time and their meanings are interrelated. They seek to emphasize the internationally recognized swastika's link to luck and happiness and, according to Periodika.lv, they appear in 1961 when several names for swastika are already in use [A. Brastiņš 1961: 24]. As Guntis Eniņš points out, this only furthers the confusion and he still "does not have a clear conviction of how this compromised symbol should truly be called" [Eniņš 1988: 2558]. The association of the swastika with Pērkons and Laima at the same time creates a structural problem for *Dievturi*: considering it a symbol of Laima would put in at the highest rank of symbols among *dievestības zīmes* ("signs of faith") because Laima is regarded as one of the highest deities but considering the swastika a symbol of Pērkons would rank it lower among *debess parādību zīmes* ("signs of celestial and atmospheric phenomena") [Bīne 1937: 99]. This confusion is later solved by Valdis Celms. He explains that Laima and Pērkons are connected: both are creators and agents of destiny, but in different scales – Pērkons – in the universe

or macrocosm; Laima – in the microcosm or human life, therefore, both names for the symbol are correct [Celms 2016: 62–63].

Even though starting from the 1980s *Laimas krusts* and *laimes krusts* appear in publications more frequently, they can hardly be deemed popular. *Laimas krusts* appears in LVK2022 in 4 instances, in one of them explicitly mentioning positive energy generation in a bathhouse through this symbol. As mentioned before, Wikipedia article states that the rotation direction of the Laimas krusts is opposite to that of the Pērkona krusts, but no evidence supporting this has been found.

Other names for swastika in Latvian include *zaru krusts* ("cross of branches"), *dzirnaviņas* ("little mill") and *zalkši* ("grass snakes"). While revealing interesting alternative narratives of the swastika, such as it representing the rotating sky around the fixed North Star just like a mill [Grāvītis 1990; Ambrazijienė 2003] or two crossed snakes [Buks 1992] they are not common in publications or corpora.

Lithuanian names for the swastika

Considering that the tasks and goals of the study were set from a Latvian perspective, finding Lithuanian samples proved to be more difficult. As Lithuanian culture tends to view ornaments holistically, a smaller variety of ornament names is unsurprising. Even though several swastika names emerge from various Lithuanian sources, preference has been given to the general and international *svastika*.

***Svastika*.** Although it often evokes negative associations, it is still the most commonly used name for the ornament in Lithuanian. No negativity can be viewed in the etymological and semiotic explanations of the symbol though. Compared to Latvian studies, Lithuanian researchers more often emphasize swastika's connection to light. This could be because Lithuanian speakers can hear a clearer connection between the words *svastika* and *švaistyti* ("to scatter, radiate"), *šviesti* ("to shine"), and *šviesa* ("light"). The Latvian *svīst* ("to become bright") which derived from the same root is rarely used in this meaning today, so the etymological link is not as detectable in Latvian.

Some Lithuanian authors reflect on swastikas in relation to Sanskrit, an approach which is not so common among Latvians. Š. Šimkus, analysing the Rigveda texts, notes that *svasti* is not associated with an inert state of happiness or success, but rather with motion, escaping an adverse state, or a successful return home – in other words, happiness is a journey, not a destination. *Svasti* has also been used to denote the journey of the sun god *Sūrya* across the sky [Šimkus 2019: 71–75]. Other Lithuanian researchers have written about the dynamic nature of the swastika and celestial bodies as well [Beresnevičius 1992; Gimbutas 1958].

It was not possible to prove the earliest use of *svastika* but it can be established that it was used during 1920s and 1930s when folklore in Lithuania was researched

just as keenly as in Latvia. However, the symbol was not considered significant to Lithuanian ornament: it is absent from Paulius Galaunė's *Lietuvių liaudies menas* ("Lithuanian Folk Art"), which includes a full chapter on ornaments [Galaunė 1930], and from Jonas Basanavičius' review of the IV Art Exhibition, where around 50 ornament names are listed [Basanavičius 1910]. It is possible that swastikas attract less attention in Lithuania simply because they are less widespread in Lithuania than in Latvia [Tumėnas 1992, 61].

In the Lithuanian language corpus (DLKT), *svastika* mostly appears in negative context (56 instances or 58%) in direct relation to Nazism and vandalism. When its usage is neutral the term is accompanied by descriptors like *rytiška* ("Eastern"), *budistinė* ("Buddhist"), *tautinė* ("ethnic"), and *pagoninė* ("pagan"), showing a desire to differentiate from the symbol's general negative connotation. Survey responses also show a similar picture: nearly all Lithuanian respondents indicated negative associations with *svastika*.

Swastika names in *margučiai* (Easter egg) ornaments. While swastikas do appear on Lithuanian ethnographic textiles such as *nuometai* (a type of women's headdress) [Kargaudienė 1992: 23] and sashes [Tumėnas 1992: 61] their most notable and elaborate variants can be found on Lithuanian Easter eggs. Swastikas used on eggs also have peculiar names: *gaidžiai* ("roosters"), *sūkurėlis* ("little whirl") and *zalčiukai* ("little grass snakes") which specifically refers to a three-branched variant of the swastika [Stravinskienė 1993: 7; Emaitytė 1996]. The swastika's link to snakes also appears in Latvian literature [Klētnieks 1990: 24; Celms 2011: 215] and in the typical Curonian brooches featuring a swastika formed by four snakes (Figure 5), found in both Latvia and Lithuania [Bliujienė 2000: 23; Zemītis 2004: 59].

Sūkurėlis. This name is the second most popular swastika name in Lithuania and even appears in the Lithuanian Wikipedia article regarding the swastika. As mentioned before, this term is used to describe swastika patterns on *margučiai* but it is also used by members of Romuva, an organization which could be described as the Lithuanian counterpart of the Latvian *Dievturi*. In *Baltų tikėjimas* ("Baltic faith") *sūkurėlis* is described as a dynamic symbol of fire and associated with *Dievas* (the supreme god), Perkūnas and his wife Laima [Trinkūnas 2000: 109] – these ideas correspond to the doctrine of Latvian *Dievturi*. It is also worth noting that this name normally refers to a swastika with rounded edges and this type of swastika was also adopted as the main emblem of the Romuva movement. Brooches featuring similar designs have been found in territories inhabited by the Curonians [Bliujienė 2000: 23; Zemītis 2004: 59]. This type of swastika was included in the survey, and unsurprisingly none of the Lithuanian respondents perceived it negatively. It was also deemed positive by Latvian and international respondents.

Sūkurėlis is present in DLKT only in one instance, which is not related to ornamentation. It's non-diminutive form *sūkurys* ("whirlpool") appeared 347 times, with only one instance referring a swastika. *Sūkurys* was also mentioned in some survey responses as a variant.

Swastika names adopted from Latvian. Since the 1990s, Lithuanian articles show a trend of adopting Latvian swastika names such as *ugnies kryžius* ("fire cross"), *Perkūno kryžius* ("Thunder Cross"), and *Laimos kryžius* ("Cross of Laima"). These appear first in works discussing Latvian ornaments [Matulevičienė 1991: 8; Endriukaitienė 1995: 38; Dziarnovičius, Kviatkoustaja 1999: 50] or citing Latvian sources [Ambraziejienė 2003; Tumėnas 2015], suggesting they are borrowings. The spread of these terms may be linked to the Lithuanian translations of V. Celms' works which are frequently cited in the literature. Of these only *ugnies kryžius* appears in DLKT (4 instances), with three instances clearly referring to the swastika.

Even though swastika's association with Perkūnas (the Lithuanian equivalent of Latvian Pērkons) has been explained both through semiotics and mythology, as well as archaeological evidence, the name *Perkūno kryžius* only appears in the previously mentioned Latvian-related sources and is not found in DLKT but some of the Lithuanian respondents' mention having heard this name. The responses also included *Laimos kryžius* and in Lithuanian Wikipedia, an image showing swastikas in Latvian ethnography is labelled as *Laimos kryžiai* ("Laima's crosses"), which again notes that the symbol has connotations to both – Pērkons/Perkūnas and Laima. Even though the Lithuanian sources don't explain the link between swastikas and Laima, V. Vaitkevičius mentions the invocation of Perkūnas in Latvian and Lithuanian wedding traditions [Vaitkevičius 2020: 110]. Weddings are generally considered to be Laima's responsibility and A. Brastiņš linked the usage of swastikas in bridal attire to Laima [Brastiņš 1961] showcasing a field where the functions of these deities overlap.

Lithuanian sources also mention *šakų/šakotasis kryžius* ("cross of branches") and *kablių kryžius* ("cross of hooks") however, these are too general to be deemed as borrowings from Latvian and are most probably derived from German.

Names related to sun. Although there are no specific names, the swastika is often compared to the sun and referred to as *saulės ženklas* ("sign of sun") or *saulės simbolis* ("symbol of sun"). This is likely linked to the widely documented interpretations of the swastika as a symbol of light and celestial movement. The term *saulės ženklas* appears in DLKT in 3 instances, in all of them with a neutral meaning. Same as in the Latvian corpus, one example clearly demonstrates the contrast between a local name and the negatively connoted international one: *tai ne svastika o saulės ženklas* ("it is not a swastika but a sun sign").

Conclusions

Compared to Lithuania, Latvia demonstrates a greater variety of names for the swastika, and its usage is more frequent. Swastikas are more prevalent in Latvia's archaeological heritage – a point also noted in Lithuanian sources. Some examples are highly ornate and visually distinct from the simplified Nazi swastika, evoking fewer associations with its ideology.

Unlike Lithuania, Latvia lacked its own ancient state symbols (such as *Vytis* or Columns of Gediminas), which led to the incorporation of traditional signs, such as the swastika, into the national visual identity during the early 20th century. The *Dievturi* movement, which actively linked ornamentation to Baltic mythology, further encouraged broader discourse and multiple symbolic names.

In contrast, Lithuania predominantly uses the single term *svastika*, with alternative names such as *sūkurėlis* confined to specific cultural circles like Romuva or practices like Easter egg decorations. Discourse in Lithuania emphasizes the swastika's association with light, possibly due to the linguistic connection between *svastika* and words related to light, such as *švaistyti* or *šviesa*. Despite this, *svastika* carries mostly negative connotations in public perception.

In both countries, local terminology helps to distance the symbol from its Nazi associations, even though names like *ugunskrusts* and *pērkonkrusts* are not free from controversy, due to their ties to radical political movements.

This study also shows how the scientific discourse affects public perception. In Lithuania, the swastika is generally seen as a solar symbol but in Latvia it is more often linked to Pērkons and ancestral beliefs. Views differ on whether it is central to local culture, aligning with archaeological and cultural research.

It also highlights the value of emic and etic perspectives. Studying Latvian material emically and Lithuanian material etically allows meaningful comparison. The emic approach offers richer data, while an etic perspective yields more limited data that may be more concise but it can be hard to identify causality. For a Latvian, it was difficult to understand why in Lithuania the swastika never took on a role as a national or state identity representing symbol until a Lithuanian bachelor's student of history (Naglis Grasmanas) pointed out an obvious reason – in Lithuania, this role is fulfilled by the old statehood symbols of the Grand Duchy of Lithuania. Some cultural knowledge is so embedded that it is left unstated in academic publications. For a Latvian – for whom the connection between traditional ornaments and national identity is often assumed – this was not immediately evident.

Although the emic position can carry preconceived notions, it does not inherently mean a lack of objectivity. A core responsibility of the researcher is to question assumptions, including one's own. It is also important to recognize that no

culture is monolithic; any emic perspective represents only a segment of a broader community. Also, the difficulty to view both cultures emically highlights how Latvian and Lithuanian cultures, often grouped together as "Baltic", can differ significantly.

It was also observed that Lithuanians have written more frequently about Latvian culture than Latvians have about Lithuanian. Fortunately, this can be easily remedied. This research should be viewed as a preliminary overview. The surveys, which came as a later addition, provided valuable insights. With a wider scope and as a part of a larger interdisciplinary study, they could yield deeper insight not only into ornament terminology but also perception and national identity.

Acknowledgment

The research is financed by the Recovery and Resilience Facility project "Internal and External Consolidation of the University of Latvia" (No. 5.2.1.1.i.0/2/24/I/CFLA/007)

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LINKING GARMENTS TO KNOWLEDGE: TEXTILEBASE AS AN INTERDISCIPLINARY GRAPH FOR DRESS AND TEXTILE RESEARCH

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Abstract

The article demonstrates how dress history and textile-related research can be enhanced through the interoperability of knowledge provided by a knowledge graph. The growing availability of digital cultural and historical data is not matched by a similar increase in their usability. Therefore, expanding the search radius to collections across disciplines and countries requires harmonisation and interoperability of knowledge. Reprex has created TextileBase – a knowledge base fully interoperable with libraries, archives, museums, the open knowledge system Wikidata, and open science repository systems. The article highlights key considerations when formulating searches and addressing terminology dissimilarities to ensure that data providers working across country, language, or disciplinary boundaries understand the intended meaning. To improve and streamline searchability in libraries for textual sources mentioning relevant historical garments, archives for their contemporary depictions, and museum collections for new artefacts, TextileBase transforms data and metadata into knowledge statements, links terms to an international controlled vocabulary, and carefully compares the works of various research and collection institutions.

Keywords: *dress history, digital humanities, research data, data curation, knowledge base*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.571

ISSN 2500-9974

CULTURE CROSSROADS

Introduction

Clothing and textiles are interdisciplinary fields drawing on economics, technology, fashion, social anthropology, and history, to name just a few. Since 1980s the study of clothing history encompasses not only the evolution of patterns and designs over time but also the broader context of their creation and use [Welters and Lillethun 2018: 58–61], such as craftsmanship, trade, employment, gender roles, behavioural norms, information exchange, moral norms, prestige, and mythological beliefs, among many other aspects. Even when historical communities are poorly documented, the preserved clothing can provide dress historians with valuable insights regarding the society at a particular time and place.

As diverse as the history of clothing is, so too are the types of knowledge sources and data recorded to their study. The three main categories of sources in dress history from a knowledge carrier point of view are material, visual, and written [Taylor 2002]. The work of a researcher and a cultural and dress historian specializing in the late modern Baltics depends on the availability of these sources and the researcher's ability to produce, evaluate, and connect data derived from them.

When studying these sources, one should aim to gather as much data as possible so that it can later be structured, organised, and compared with other data from a wide range of sources. Ideally, this comparison extends across different regions and time periods. Since these sources are housed in the collections of various memory institutions, it is the researcher's task to connect them to gain a comprehensive understanding of both the sources themselves and the data they provide. Different types of data emerge from different sources – material, written, and visual sources do not yield identical information. Only by integrating all available sources can a researcher aim to construct a complete picture. Therefore, it is essential to establish methods for connecting data as effectively and compatibly as possible.

Although much of the source examination and data collection still requires physical access, an increasing amount of data is being published online, allowing more research to be conducted digitally. The growing data availability is not matched by a similar growth in usability. Ideally, a researcher should ask the same question from all the relevant museums, archives, and libraries where a source may answer the question. Meanwhile, cross-institutional queries are yet more a promise than an available possibility because museums, libraries and archives even after decades of investment into interoperability store knowledge in different ways. In Latvia, asking all written and textual sources about a particular material is still mainly a future prospect. This article demonstrates practical steps toward making this a reality: it requires moving beyond simple inventory searches to more semantically rich methods.

The same interoperability enhancements, if carefully designed, can broaden research beyond linguistic and national boundaries. However, as we increase our search radius to collections of different disciplines in different countries, harmonisation of knowledge becomes even more pressing. Location names follow different conventions, not only linguistic differences. Time appellation also has different formats in countries and disciplines, so a seemingly simple search for the first half of the 19th century related to the Latgale region requires a very careful elaboration of these quantifiers in German, Swedish or Russian-language collection of fashion, ethnography, or visual history. In this article, using examples of datasets based on original research in Latgale, Livonian Coast, and Setomaa, we show our conceptual system that can solve many of these problems.

Combining the expertise of the Reprex team and a dress historian, we began developing TextileBase [*TextileBase*]—an expandable graph database that brings together information on garments from diverse humanities collections and related scholarly research. Our aim was to make our methods and findings reusable across disciplines, particularly for textile research and art history. How can the knowledge of these researchers be made interoperable with the research processes of adjacent disciplines that work with knowledge of historically used textile production, for example, in searching for more sustainable contemporary fashion uses? How can we ensure better and more efficient searchability in libraries for textual sources mentioning historically relevant garments, archives about their contemporary depictions, and various museum collections for new artefacts? Would it be possible to test simple or more complex hypotheses with an intelligent system that can sift through thousands or more catalogue items in various knowledge systems in the world? The aim of this article is to show our answers to these questions.

State of the art and our approach

We started working in 2024 with a single dataset made during numerous visits to the collections of the Latvian National Museum of History and the Ethnographic Open-Air Museum of Latvia in 2018–2020, to see how modern advances in digital humanities can support the continuation and expansion of the research agenda behind the *Development of Folk Dress in Latgale in the 19th Century* (1.1.1.2/VIAA/1/16/092) project. The initial garment datasets from 19th-century Latgale, compiled in simple spreadsheets in a single file by Ieva Pigozne, a textile researcher and cultural historian, contained several tabular datasets on shirts, skirts, aprons, and other garments.

In the broader field of humanities research, scholars frequently work with data from GLAM institutions (galleries, libraries, archives, and museums), which are typically managed using relational databases. These systems connect, for example, an inventory number to a garment in a museum's collection and can return

associated metadata such as acquisition dates or provenance. Relational databases are highly performant and well-suited for managing structured data at scale – such as the millions of catalogue queries processed daily by large libraries.

However, relational databases are less effective when data is distributed across diverse, heterogeneous systems. In such cases, graph databases offer a more flexible approach. They allow researchers to model and query complex relationships and interconnected concepts, even when the data originates from incompatible sources. While graph databases may be less optimized for high-volume transactions, they excel at uncovering patterns, associations, and hierarchies within and across datasets.

For our purposes, a graph-based knowledge base was the natural choice.

According to the ISO/IEC 24707:2023 standard [*ISO*, 2023], a *knowledge base* is a repository that contains structured information along with inference rules, representing human expertise and experience within a specific domain. In self-improving or intelligent systems, a knowledge base may also include information derived from solving past problems. The terms *knowledge base* and *K-base* are standardized under ISO, emphasizing their role in supporting reasoning, decision-making, and semantic interoperability.

Knowledge bases are frequently implemented using graph databases, because their structure – often a semantic graph – can capture rich relationships between concepts, entities, and contexts. To store our knowledge base, we adopted Wikibase, a powerful, open-source graph database system originally developed to support the multilingual alignment of Wikipedia content. Wikibase has become widely used in digital humanities for harmonizing heterogeneous data sources, connecting library services [Bianchini et al. 2021; Sardo and Bianchini 2022; Van Veen 2019], museum services [Pfeiffer and Gayo 2021], and archives, and creating interoperability among the institutional silos of these three types of heritage collections [Alexiev et al. 2020; Rossenova et al. 2022]. EU institutions themselves also use it [*SEMIC 2020*]. Wikibase was originally designed to harmonise the knowledge behind more than 300 Wikipedias written in different languages. Wikidata, that serves this purpose, is the world's largest open knowledge graph that contains more than 1.5 billion knowledge statements, many of which benefit TextileBase, too.

TextileBase is following the data curation and governance model of the Slovak Comprehensive Music Database, which has solved similar legal, organisational, semantic and technical problems in the *Open Music Europe* project, albeit not on material, tangible heritage objects, but intangible cultural assets, such as musical works and their recordings and scores[1]. This precedent illustrates how diverse datasets

[1] See the planned *Slovak Comprehensive Music Database* [Antal 2023], which can be federated to further countries [Antal 2024] created in the [*Open Music Europe* 2023] project.

can be harmonised across legal and organisational boundaries, and how to get inspiration from the European Interoperability Framework (which is applicable for publicly funded digital services) and the evolving concept of the data (sharing) space.

A dataspace is an emerging approach to data governance. It recognises that in large-scale integration scenarios involving many partners, it would be prohibitively expensive and time-consuming to obtain an upfront unifying schema across all sources or to come to a legal agreement on using or exchanging the data. It is an intelligent application that allows a near-instantaneous exchange, processing, sharing and provision of data on an "as-needed" or "as-permitted" basis while retaining complete control of each data holder over the conditions (e.g., who, when, and under what condition) of access to their data [Curr, 2020; EBU and Gaia-X 2022: 16; Nagel and Lycklama 2021]. TextileBase does not require a continuous online connection with different data providers: it consolidates garment-related knowledge periodically.

TextileBase is a semantic research infrastructure: it is a knowledge base supported by a graph database and a SPARQL API, which is designed to curate data and provide it for comparative textile and dress history research, with an evolving scope. Its current focus is on textiles from approximately 1820 to 1920 and from specific regions in present-day Latvia and southeastern Estonia. TextileBase integrates structured data and, where possible, digital surrogates (e.g., photographs, 3D visualisations) of garments and related artefacts to enable detailed cross-regional and diachronic analysis. It follows interoperability requirements with the European Open Science Cloud, Europeana and the evolving European Cultural Heritage Cloud.

It contains an increasing number of datasets, and some of the same datasets – especially those concerning Seto and Livonian garments – are also curated into a technically compatible infrastructure: the Finno-Ugric Data Sharing Space (FUDSS). While TextileBase is dedicated to textile-specific research questions, the FUDSS supports interdisciplinary research in Finno-Ugric studies, placing garments and visual culture in the context of language, music, ethnography, and regional history, allowing us to broaden our experience with methodology, and also to gain interdisciplinary feedback into textile research questions.

Both data sharing infrastructures follow a linked open data model, emphasising the creation of rich, extensible, and interoperable structured data. They also support the gradual accumulation of multi-modal data and enable cross-institutional collaboration through their flexible and federated data space governance model. Together, they aim to foster both domain-specific and interdisciplinary research across the Baltic and Finno-Ugric cultural areas.

Each artefact or secondary source – such as a garment, photograph, publication, video recording, or other knowledge object – is represented as a modular, entity-centred RDF dataset in a Wikibase document database, available in all five standard

RDF serialisations (Turtle, JSON, JSON-LD, N-Triples, RDF/XML). For example, the *traditional Livonian women's festive woollen skirt*, collected by A. O. Heikel in 1902 in Miķeļtornis from the Antell's Collection and held at the National Museum of Finland, is described at https://reprexbase.eu/textilebase/Item:Q347 and can be downloaded in Turtle format at https://reprexbase.eu/textilebase/Special:EntityData/Q347.ttl .

Whenever possible, such datasets include the link to a downloadable, viewable CC-BY licensed digital surrogate – a photograph, video, or 3D representation – embedded directly in the record. When full images cannot be shared, we provide either a thumbnail preview or a URL pointing to an external surrogate on a museum's website. This model enables flexible knowledge extension: new findings or new depictions of an artefact can be integrated into its dataset as elementary RDF statements. These modular datasets are the building blocks of growing semantic knowledge graph.

We organise these RDF records into regional databases, each associated with a virtual collection of digital surrogates when available. So far, we have created:

- a database of garments from Latgale (based on primary field research) [Pigozne et.al 2025],
- a database of garments attributed to Livonian users in Northern Kurzeme,
- a Seto garment database (blending linked and manually curated data),
- and an initial Riga metropolitan dataset.

At the time of writing our manuscript, with the help of a small grant from Finno-Ugric researchers and the support of the Estonian National Museum, we are also piloting a small Mari database to increase our geographical coverage, and gain experience with an increasing number of primary source languages. This dataset, like the Livonian and Seto data, are also shared via the Finno-Ugric Data Sharing Space, reflecting their relevance to Finno-Ugric cultural and linguistic research. These artefacts are mainly held in institutions in Estonia, Finland, and Hungary, with some Livonian artefacts stored in Latvia.

To illustrate our work and expectations, we provide two competency questions for a knowledge base that were guiding our methodological and technical research. In our work and in this article, we have chosen to focus on shirts as an essential garment of 19th-century traditional clothing.

Thus, the two questions are:

Q1. Where were linen shirts of traditional tunic cut, sewn by hand, still in use after 1850?

Q2. How can we search for information about shirts that match the criteria above in libraries, archives, and museums?

The two competency questions broadly set out our two methodological objectives in the design and creation of TextileBase as a research platform. We wanted to create knowledge base supported by a database management system that allows us to create datasets and then query them to investigate the use of traditional tunic cut, hand sewn shirts appearing in primary artefact sources or in secondary sources with time (and regional) limitations. TextileBase currently stores such information in RDF and allows such queries, therefore it can support a digital humanities research workflow. The second competency question relates to the ability to curate data from various museums, archives or libraries; considering also different modalities of still images or textual information; it allows us to ingest and store more and more structured knowledge so that we can gradually expand the time, geographical coverage, or the depth of answers that it can provide to research questions. This question relates to the problem that we do not have a central institution of textile research where we could go through all books, archival records, and historic garment artefact data which relate to the traditional tunic cut shirts. Museums, libraries, and archives still work in silos, with limited catalogue interoperability. Ieva Pigozne's prior work contained such information for the Latgale cultural region of Latvia. Our goal was to expand this dataset for comparative purposes across regions and contexts. Ideally, we would find textile researchers in, for example, Lithuania and Sweden who record the same data in the same tabular format. But in the absence of such researchers, we can also work with data created by different workflows of librarians, ethnographers, perhaps even researchers of sustainable fashion who physically inspect historical garments, recorded relevant information. They may call a shirt a chemise, and they may use many subcategories of linen, so content negotiation is necessary. But if they have such knowledge, we should be able to locate and curate it and then make it available for our primary target audience, the textile researcher.

Semantic interoperability and governance

As an answer to these competency requirements, we began building TextileBase, a linked open database around the first dataset. We defined TextileBase as a knowledge base that is fully interoperable with libraries, archives, museums, the open knowledge system Wikidata, and the open science repository systems (including EOSC and the fledgling European Cultural Heritage Cloud, EACH.) We chose the open-source Wikibase system, which has been used successfully many times in digital humanities and all essential GLAM collections. For SPARQL queries, we import the database created by Wikibase into an Apache Fuseki Jena server; in the case of Finno-Ugric materials, we also place it into the Sampo semantic browser developed by Ikkala and the team [Ikkala 2021]; these functionalities can be tried out via the opening page of TextileBase on https://reprexbase.eu/textilebase/index.php?title=Main_Page.

Our choice of the use of Sampo-UI was the excellent conceptual work of the Semantic Computing Research Group at the Aalto University working towards and extension of the 5-star FAIR model, often treated as a the "gold standard" in European open data towards an 8-star model that ensures a higher, cross-institutional interoperability, testing against semantic tools, and adding information on data quality [Hyvönen et al. 2024].

Semantic interoperability allows a shared understanding among different datasets to be joined and analysed together. It means that data arriving from different sources, such as Finna.fi or Muis.ee, or a researcher's CSV table, are mutually intelligible. This is not achievable without a critical revision of the workflows used by various museums, libraries, archives; and it is also not practically useful without legal interoperability. When different organisations create the datasets, adjustments, translations may be needed. And of course, we must consider the legal permission of data access and reuse. These issues go beyond the technical and semantic interoperability and require some form of data governance.

TextileBase follows the European Union's data sharing space model, inspired by the European Interoperability Framework, which integrates technical and semantic interoperability with broader considerations of legal and organisational compatibility. A data sharing space enables modular and federated data governance, where integration occurs on an as-needed, as-permitted basis. This model accommodates both large institutional partners and smaller, community-based collections.

For example, Finnish and Estonian institutions – particularly via Finna.fi and Muis.ee – publish well-structured, often RDF-compatible metadata and digital surrogates under CC-BY licenses, allowing TextileBase to import them. In contrast, Latvian national institutions generally do not provide reusable metadata or openly licensed images. Hungarian institutions may offer structured data and digital surrogates under various licenses.

Although Finna.fi and Muis.ee provide reusable metadata and digital surrogates under open licenses, it is important to note that these platforms are designed as generalist, nationally representative infrastructures, not as domain-specific tools for textile research. Their structured metadata – while consistent and machine-readable – lacks textile-specific detail, such as structured garment typologies, information on weave structures, or material properties. For instance, Muis.ee's RDF exports typically rely on free-text descriptions in Estonian and do not use textile-relevant ontologies or thesauri. We therefore do not simply ingest their RDF files or other structured data "as-is"; rather, we enrich and reinterpret the records, increasingly using linguistic models and domain-specific vocabularies to align them with comparative textile research needs. These generalist platforms offer a valuable foundation, but our work begins where theirs appropriately ends.

A key benefit of the data sharing space model is its support for heterogeneous curation workflows, including collaboration with smaller institutions. For example, the regional museums of Preiļi (Latvia) and Värska and Obinitsa (Estonia) provided open access and active and helpful collaboration, though they lack structured data services and are not yet integrated into Muis.ee. In these cases, the TextileBase team manually curated records from Excel files and created digital surrogates through fieldwork.

The federated, modular governance model accommodates diverse levels of digitisation, legal openness, and technical readiness—allowing TextileBase to function as a scalable, collaborative research infrastructure across institutional and national contexts.

In some cases, institutional or geopolitical constraints restrict data access. Both Latgale and Setomaa border the Russian Federation, and historically significant areas of Setomaa – including Pechory (Petseri) and its other parts from the Pskov region – are now within Russian territory, just like the Mari El Republic. Many relevant artefacts and archival materials are housed in Russian collections. Since the onset of the war in Ukraine in 2022, collaboration with Russian museums and research institutions has become impossible. Nonetheless, the federated architecture of TextileBase allows for the inclusion of basic metadata about known Russian holdings, preserving the possibility of future reintegration and maintaining a broader view of textile heritage in the region.

Usability for textile research

A typical first question from a dress historian might concern when and where a garment type was used. Using our example, which contains data on 19th-century linen shirts, a dress historian might want to explore where and when similar shirts were worn. However, to get meaningful results, the question needs to be more specific. A better query might be: "Where were linen shirts of traditional tunic cut, sewn by hand, worn in 1850–1900?" The responses to this query would be specific enough to help researchers address key issues in dress history today.

Linen tunic shirts were long-used undergarments in Europe, and by the late 19th century had become largely restricted to peasant dress, as they were no longer worn by the upper classes. Peasants, the largest social group in most European countries at the time, were the last to abandon traditional clothing. Many elements of their attire were still handmade at home, and as the precisely dated garments, interviews, and photographic evidence shows, linen shirts were among the garments crafted domestically for the longest time. However, from the mid-19th century onward, peasants gradually transitioned to clothing that reflected urban fashion, often made from industrially manufactured fabrics and cut in styles influenced by towns.

Tracing the decline of traditional garments, such as hand-sewn linen shirts of tunic cut, is particularly informative. These shirts disappeared earlier than machine-sewn linen shirts and those with more modern cuts. Observing the spread of this innovation can help researchers identify where fashion changes first emerged and were adopted most rapidly. When combined with research results or historical records from other areas, such as history of agriculture, transportation, and education, these insights can lead to a deeper understanding of rural life in the second half of the 19th century, peasant interactions with towns, and possibly even patterns of trade and information exchange.

Moreover, such research allows for comparisons across communities, regions, and countries. For example, in Latvia, rural populations near Riga adopted fashion novelties earliest, while the people living on the Livonian Coast or Latgale followed a decade or two later – northern and eastern Latgale being slower than its southern and western parts. Adjacent territories in present-day Belarus, which belonged to the same Vitebsk Governorate of the Russian Empire as Latgale, or Setomaa which belonged to the neighbouring Pskov Governorate, underwent similar changes yet another couple of decades later. Extending these comparisons to other European countries would provide valuable insights into rural communities' transformation, including clothing changes, on a much broader scale. This, in turn, would lead to new discoveries and a deeper understanding of historical developments.

Without going into technical details of our data model, suffice to say that to answer question No.1, we needed to organise data in a way that contains information about the five properties of the garment.

- Garment type: we are looking for shirts, whilst mindful that a chemise is not the same as *krekls*. Therefore, we use a hierarchical taxonomy that is internationally and widely used for garments and other aspects of art history.
- Cut of the shirt: tunic, meaning that the front and back of the shirt are made of one piece of fabric which is not cut at the shoulders and with a hole left for the head.
- Fabrication method: we are looking for references of being sewn by hand, as opposed to machine-sewn and industrially produced.
- Used in the timespan of 1851–1900: careful distinction between use date, collection acquisition date, and fabrication date.
- An appellation for place of use: Latgale itself is a very fluid term, but we need to ensure that whatever contemporary or current settlement, parish, region or country is mentioned, we understand it correctly.

The dress historians input in designing the database are crucial to understand the nuances between a Latvian *krekls,* English *shirt,* and French *chemise* (a term also used in English), to find a useful category for the cut of the shirt, but for contemporary

and historical place appellations we can rely on geographers, or for categorisations on the work of generations of art historians and their librarians embedded in the making of the Art & Architecture Thesaurus (AAT) [*Art & Architecture Thesaurus*] to provide a consistent terminology about the fields of art and architecture.

One might assume that translating a simple Latvian word like *krekls* is straightforward, but this is not the case. In English, 19th century historical shirts have two distinct names: shirt for men's garments and chemise for women's. However, this distinction cannot directly be applied to traditional Latvian, Estonian or other peasant clothing of Northern and Eastern Europe. The chemise, as known in English, differs significantly from peasant women's traditional shirts.

Many collections around the world use the English-based but widely translated AAT thesaurus to describe garments. This hierarchical taxonomy is a very useful start to cast our net to find potential Latvian *krekls* in a foreign collection. Latvian men's and women's shirts were similar, with subtle distinctions in length and decor. While they could feature decorative elements, they could also be undecorated, making the differences minimal and sometimes barely noticeable. TextileBase can extend AAT with custom categories to better bridge cultural garment types, for example, distinguishing chemise and the *krekls* by adding its wearer – Latgalian or Livonian women. From now on, we can go hunting for further female shirt data.

Figure 1. Fragment of the female festive shirt (CVVM 12753) from Šķilbēni municipality in Latgale, Latvia. Collection of the National History Museum of Latvia. Photo by Ieva Pigozne.

From data to knowledge

When we build a knowledge graph, we want to convert data to knowledge statements.

The following data points are not very informative in themselves:
data: "Rēzekne", "Latvian National Museum of History", "CVVM 12667", "festive shirt", "woman".

Metadata makes a potentially informative data point much more usable:

metadata: "place of find", "holding collection institution", "inventory number", "garment type", "intended user".

For the researcher who created the original fieldwork journal and its tabular spreadsheet version, it is clear that "Rēzekne" is a location that does not refer to the "Latvian National Museum of History" but the place where the "festive shirt" was found. To make the research diary usable for another dress researcher familiar with the Baltic region, we should provide the metadata at least; ensuring metadata attached enhances interoperability.

An even higher level of reusability and interoperability can be reached if we transform the data and the metadata into knowledge statements. When we start to collaborate with researchers who do not know the Baltic region, or do not speak the local language, or work in an adjacent field of sustainable fashion research, we must be more specific. Is "CVVM 12667" identifying the shirt, the museum, the village, or the woman?

- "CVVM 12667" is issued by "Latvian National Museum of History".
- "Ieva Pigozne" assigned the following characteristics (based on her inspection of the original shirt: it has "tunic cut" design, it is made of "linen" and "cotton", and was intended for "women", and it used "hand sewing" on "plain weave".

Such a transformation makes data more reusable by reducing ambiguity. And we can enhance this reusability even further.

Linking the "identified by" property to controlled vocabularies and their carefully reviewed translations, we can convey the message that "CVVM 12667" is a unique identifier of the garment under observation. Linking the word "women" to an international controlled vocabulary, we can ensure that users who do not speak English but look for similar garments can replace "women" with "woman", and then "woman" with "*kvinne*" or "*nő*".

Knowledge statements carry truth values and are verifiable. The claim that "CVVM 12667" is issued by "Latvian National Museum of History" can be verified easily to be true. Meanwhile, much scientific advancement happens through proofs and refutations. Adding provenance statements allows the next users to determine

how much they trust the information about "CVVM 12667". Was it inspected by a general museologist, a dress historian, or a researcher of sustainable fashion? Did the inspection happen recently or in the last century? Are their inspection reports available?

Does the inspection report of "Ieva Pigozne" corroborate the "Daniel Antal" inspections or cast doubt on them? Daniel Antal can measure length (corroborating such a claim by Ieva Pigozne) and can create colour-accurate photographs and assert the accurate description of the colours of the linen or decorations, but he may not see the difference between a chemise and a *krekls* (his observations on garment classification are useless.) Ieva Pigozne is a competent dress historian with no graded colour scale (therefore the other author's evidence may add further detail, but only in terms of defining the colours of parts of the garment.) Adding provenance information and competency constraints make data reuse more precise and responsible.

If the authors, inspecting a shirt embroidered with wool yarn, made a particular claim about the type of wool from a particular variety of sheep, is this really a credible claim? Not all observations require disciplinary expertise – but provenance clarifies when they do. Perhaps neither of the two authors would be qualified to make this distinction; however, unless somebody wants to bring our observations to a faraway disciplinary field (farming history and sheep varieties reconstructed from historical wool species [Ryder 1984]), our observation about the wool is sufficient. If a farming historian wants to know more about the wool, that researcher at least knows where to find another wool specimen from the 19th century Latgale but cannot rely on our observations regarding breed history.

The transformation of data to knowledge statements supports structured, qualified reuse across disciplines. The best way to show the advantages of this increased reusability is by improving the ways how we handle geographic labels – leveraging tools from historical geography. Place appellation is particularly difficult in the Baltic region because place names have changed significantly over time and between languages. Places were differently named by Russian, German, and Polish authorities in the Russian Empire, renamed and reorganized by Latvians during the interwar period, by the Soviet authorities, and in the modern independence era.

We can illustrate our solution to this issue using examples from the Livonian Coast. To begin with, place names in heritage data are often ambiguous. A single settlement may be recorded in multiple languages, scripts, or historical forms. For example, *Mazirbe* – a coastal village in western Latvia – may appear in records as *Irē* (Livonian), *Мазирбе* (Russian), *Klein-Irben* (German), or *Vähä-Irben* (Finnish-German hybrid). A museum object tagged as originating from "Irben" may therefore go unrecognized unless these variants are reconciled.

To address this, we developed a multilingual gazetteer for the Livonian Coast [Antal et al. 2025a; Antal et al. 2025b]. It aligns historical and contemporary names using canonical identifiers, geographic coordinates, and language-tagged aliases. The region was chosen for its compact scale – roughly a dozen villages – yet complex multilingual and administrative history. We cross-referenced open datasets (e.g., GeoNames, Wikidata) with scholarly sources on Finno-Ugric linguistics, ensuring accuracy across Livonian, Latvian, Russian, German, Finnish, and other naming traditions.

Instead of storing names as isolated strings, we represent each location as a knowledge node, enriched with alternate names and linked to stable identifiers (e.g., https://www.geonames.org/458007/lielirbe.html for Lielirbe). These nodes also include geographic coordinates and relationships to current administrative units. This allows us to infer, for example, that an artefact labelled from "Gross-Irben" in a Finnish archive likely corresponds to modern-day *Lielirbe*, even if the term has fallen out of use.

This model enhances recall and precision in data discovery – especially in heritage collections where place names reflect changing borders and multilingual cataloguing practices. It builds on prior work in Wikibase-based reconciliation [Bianchini et al. 2021; Fagerving 2023] and sets the foundation for culturally sensitive geographic reference in Finno-Ugric contexts.

Breaking institutional silos with organisational interoperability

We can envision that a dress historian would seek information about shirts matching the criteria described above in digitised databases and catalogues of libraries, archives, and museums. The most valuable information on historical topics comes from examining the main dress history sources – material, visual, and written. Therefore, we can assume that the researcher would focus on these sources or their published editions.

The specialization of memory institutions determines which sources of dress history they primarily store. Museums typically preserve material and visual sources, including garments, accessories, textile fragments, drawings, paintings, lithographs, and photographs. Archives focus on written records and visual materials, mainly in paper formats, such as documents, manuscripts, drawings, and photographs. Libraries primarily house books but may also hold visual and written sources, like archives. While museums may contain some written sources, neither archives nor libraries are likely to store material artefacts. This specialization influences how a dress historian approaches searches within the catalogues of these institutions.

Digital humanities researchers and curators of digital collections have been working in the past two decades to break these silos and allow us to search parallel for

information about Latvian traditional cut, hand-sewn, linen-made shirts in libraries, archives, and museums. Such parallel knowledge extension overlaps with the AI use of knowledge graphs.

Archive catalogue searches using keywords like "linen" or "shirt" often yield little, especially with niche descriptors, like "linen", "shirt" "traditional tunic cut", "sewn by hand", "1851–1900". However, archival records (documents) often have much more precise dating than museum collections. Unless we are lucky to investigate a special dress history collection within an archive, we will likely search for images of people – for example, women, or more specifically, peasant women – from 1851 to 1900. Most images made of women in this period show the women fully clad. This is important, because we see their garments.

Figure 2. Latvians from Daugavpils area in 1869. A photograph published by Gustav von Manteuffel. [Manteuffel 1869: 43.]

Metadata about intended wearer, location, and usage period should link the shirt to other records across systems. From photographic evidence that is dated 1869, we can infer that at least one woman was wearing such a garment in 1869. From an artefact in a museum, we may only be able to appellate for the second half of the 19th century, as the museum does not have record of a particular event when a specific woman wore that particular garment.

In technical terms, this requires a careful design of classification of nodes and properties (edges) that work in museums and archives, for example, that can connect the concept of a Woman (as a human being with a female sex at birth or such a gender identity) and the intended user to a garment. Precisely this means that we design TextileBase to contain this vocabulary from Records in Context, the new archival international standard that superseded the previous international standards in 2023. Although not yet widely adopted, RiC's [Archives Expert Group on Archival Description 2023], backward compatibility with ISAD(G) allows us to ensure strong archival interoperability.

Libraries, with their extensive collections, also contain books that systematically publish sources, including catalogues issued by museums, archives, or private collectors. However, not all catalogues feature primary sources relevant to dress history. Therefore, the researcher's search would need to specify museums and collections containing historical dress artefacts from the 19th century. Institutions or collectors focusing on aircraft, musical instruments, or firefighting, as well as museums specializing exclusively in ancient history or the Soviet occupation, would be excluded from the search. Even within history museums, some catalogues may not feature textiles in their topic-specific collections. The researcher would need to determine, for example, which catalogues from each country's National History Museum include artefacts relevant to dress history. To improve library search interoperability, TextileBase incorporates DCTERMS, the modern ontology-based extension of Dublin Core [*Dublin Core* 2020].

Museums not yet visited on fieldwork may provide access to further surviving linen shirts and their fragments from the second half of the 19th century. However, such artefacts are often imprecisely dated. Collectors typically recorded where an artefact was acquired, which usually made it possible to determine its origin. Original owners rarely knew the exact date of an item's creation, particularly if it was a family heirloom, and the most artefacts have since been dated by museum curators using relative dating based on their expertise and the characteristics of the object. The qualifications of those involved in collecting, preserving, and studying these artefacts vary, as many museums do not employ dress historians. As a result, the descriptions of garments may not always use professional terminology. A researcher's search strategy may focus on garment type (e.g., *shirt*) and material (if indicated).

Chronological criteria could be refined using search terms such as *19th century*, *second half of the 19th century*, *1875*, or *1860s*.

In technical terms, we designed TextileBase to understand the vocabulary of CIDOC-CRM, the conceptual model of museum systems [Bekiari et al. 2024]. CIDOC-CRM and RiC are compatible, and together with DCTERMS, they enable efficient, automated cross-institutional discovery of potential garment artefacts, for example, potential peasant shirts, in much higher number, search accuracy and with far less effort than traditional methods. Of course, to retain human control, expert review by dress historians and curators remains essential for validation and classification.

The previous examples also highlight the importance of differing data quality and the importance of checking the provenance of the data that we import. Is it certain that we see a peasant shirt on the picture? Is the time or place appellation of garment certain? To improve data trust, TextileBase includes provenance metadata: who observed or measured the item, when, and with what qualifications. Who measured the length of an artefact and when? For adding such information to TextileBase, we use the foundational PROV model and the PROV-O ontology [Gil et al. 2013; Lebo et al. 2013]. PROV-O is widely used by data stewards in museums, libraries, archives and open science repositories.

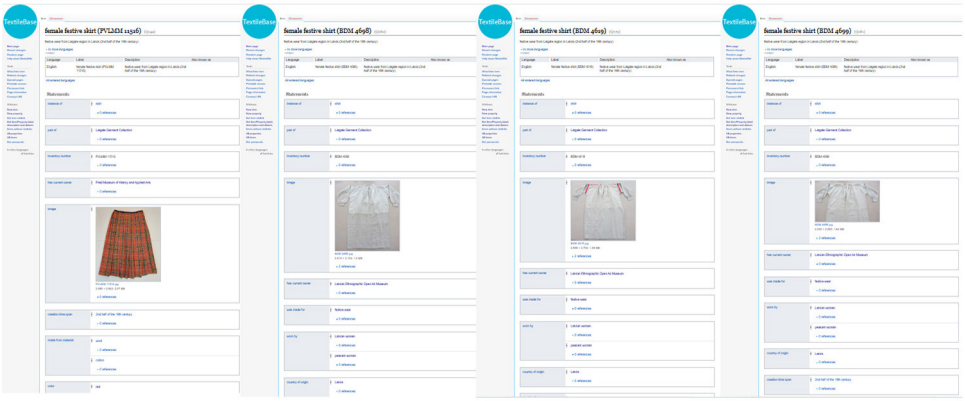

Figure 3. Entry examples on TextileBase.

Conclusions and further work

In this article, we presented the development of TextileBase, a new open knowledge graph. It operates as a data sharing space between various organisations that provide open or on-request access to their databases enabling the gradual integration of textile and dress history research data.

Researchers constantly collect data and information in the language they know from the point of view of their research agenda, with their methodology. Libraries, archives, and museums organise potentially informative data in very different ways about garments as artefacts or actual outfits worn, for example, in early photographs. Organising interoperability among their datasets or databases is not only a legal and technical interoperability question.

Achieving true organisational interoperability requires analysing institutional workflows and metadata practices. Creating such a high level of interoperability is a challenge not only on the technical level but also requires a careful comparison of the works of various research and collection institutions, as we showed with the two competence questions. It also demands semantic interoperability well beyond FAIR-compliance. We must ensure that art historians, dress historians, contemporary and historical textile researchers, librarians, archivists, and museologists are able to interpret and align each other's data with shared understanding. Time and place references must be designed to integrate with geospatial and open data infrastructures. This process and semantic organisation take a long time, and unfortunately, it must be addressed early, before populating the knowledge base at scale.

TextileBase as a graph is modest at the point of writing, but we hope it will grow quickly. Next, we aim to link it with Europeana and the European Cultural Heritage Cloud (ECCCH). We also plan to expand the graph at a granular level adding new datasets and invite individual researchers to provide us with smaller but high-value datasets.

As the knowledge graph evolves, TextileBase increasingly supports the spatial, temporal, and typological queries needed to address these and more complex questions. This reflects the authors' shared interest in digital humanities methodology, but with a strong emphasis on practical usability beyond the "computer lab" – especially in collaborative and field-based settings.

TextileBase is a developing research tool, created not only to organise data but to support hypothesis-driven historical textile analysis. The technologies described in this paper offer significant opportunities for researchers in textile, dress, and broader cultural history. We hope that our work will serve as a positive example and inspire others to join with their collections and research data, and to pursue further cooperation in the form of joint projects.

Acknowledgements

The authors are very grateful to Anna Márta Mester for the data management of TextileBase and Asmah Federico for the curation of digital surrogates.

In its initial stage this work was supported by the Short-term Scientific Mission *Collecting, Evaluating, and Connecting Data for Dress History* carried out

by Ieva Pigozne within the COST action *Europe through Textiles: Network for an integrated and interdisciplinary Humanities (Euroweb)* CA19131. Further Ieva Pigozne's work and contribution to this paper is supported by the *Recovery and Resilience Facility project Internal and External Consolidation of the University of Latvia* (No. 5.2.1.1.i.0/2/24/I/CFLA/007), grant *Contextualization of Traditional Clothing: Reassessing the Connection Between Riga and Latgale* (Grant No. LU-BA-PG-2024/1-0023).

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IDENTITY CONSTRUCTION, MIGRATION, AND FEMINISM

EPISTEMIC UNCERTAINTY AND ETHICAL DILEMMAS IN CROSS-CULTURAL RESEARCH

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Abstract

This study explores the epistemic and ethical complexities of examining migrants' trust in public services through qualitative cultural inquiry. Trust is addressed not only as the central subject of investigation but also as a condition underpinning the credibility of research findings. Drawing on implicit findings, such as unexpectedly low participation and inconsistencies in participant narratives, which introduced layers of uncertainty in the findings. The study points to indications of self-censorship, social desirability, and cultural bias, which raise concerns about the trustworthiness of the findings. These complexities present researchers with interpretive dilemmas, where their roles in decision-making regarding the trustworthiness of narrative authenticity and participant autonomy may conflict with established ethical principles. Rather than merely dismissing these patterns as mere limitations, this analysis interprets inconsistencies in implicit findings as meaningful indicators of how trust is negotiated and constrained in sensitive institutional contexts. These insights reveal deeper uncertainty in how trust is measured, narrated, and understood, and raise ethical and methodological dilemmas for researchers. This study contributes to ongoing debates about the fragility of trust-related data in vulnerable populations. It highlights the need for critical reflection when interpreting implicit findings of meaning in qualitative research.

Keywords: *trust, cultural studies, inconsistency, trustworthiness, ethical dilemmas*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.512

ISSN 2500-9974

CULTURE CROSSROADS

Introduction

Trust is a multifaceted concept, interpreted differently across disciplines. Watson and Moran [2005] emphasize its link to risk and uncertainty, particularly in contexts of social vulnerability and institutional power. This interdisciplinary perspective deepens understanding of trust's role in social and cultural settings, especially in public institutions, where it underpins governance, service delivery, and political legitimacy [United Nations 2021].

Studying trust poses methodological challenges, especially among migrant populations [Alexander et al. 2018; Van Liempt & Bilger 2012]. This paper critically examines these challenges, focusing on migrants' trust in public services. It explores epistemic uncertainty by analysing implicit findings rather than findings that correspond to predefined questions. The main aim of this study was to explore immigrants' trust in public services within the host country; however, the implicit findings also revealed the researchers' dilemmas regarding the trustworthiness of participants' narratives. While qualitative research indicates that participants' narratives can yield rich data [Ahmad 2022; Zabko 2024], this study explores the participants' narratives as a reflection of their perceived trust and its trustworthiness. Trust in this study has two aspects: the primary focus of the subject and a methodological challenge, which underscores the importance of the findings' trustworthiness. This paper addresses how selection bias in data collection and inconsistencies in participants' responses question the trustworthiness of results and contribute to epistemic uncertainty and ethical dilemmas that influence data interpretation and reporting.

1. Theoretical perspective: Ethical dilemmas

Ethical research practices are an essential part of every research, particularly when working with vulnerable populations such as children, the elderly, and ethnic or racial minorities [Alexander et al. 2018]. Despite existing ethical guidelines, scholars have identified ethical dilemmas as situations where researchers face conflicting moral obligations that cannot be fulfilled simultaneously, without a clear hierarchy to resolve the conflict [Swain 2025; Taquette et al. 2022; Fuji 2012; Colnerud 2015]. Several common ethical dilemmas include confidentiality, informed consent, researcher's positionality, and trustworthiness.

Confidentiality involves clarity about what personal information is collected, who has access to it, and under what conditions. It also includes participants' rights to understand the scope of their involvement and to maintain control over how their data is used [Bos 2020]. However, many studies highlight confidentiality as a frequent source of ethical tension in qualitative research [Fujii 2012; Ngozwana 2018; Taquette et al. 2022; McMillan & Schumacher 2006].

The most important instrument for securing confidentiality is informed consent, which means that participants should be fully informed about the study's purpose, procedures, potential risks and benefits, and their rights, including the right to withdraw at any time [Swain 2025]. The asymmetry of power embedded in the informed consent can create dilemmas [Fujii 2012].

The researcher's position plays a critical role throughout the research process. Numerous scholars have highlighted how role confusion between researchers, therapists, observers, or friends can lead to ethical dilemmas [Taquette et al. 2022; Fujii 2012; Ellis 2017; Rallis et al. 2007; Shah 2024; Ahmad 2022; Lee 2015; Zabko 2024]. In cross-cultural research, the complexities of the researcher's insider-outsider position have been critically examined by many scholars [Yeh & Barber 2024; Markova 2009; Lee 2015]. Markova [2009] argues that the insider status is shaped not only by shared ethnicity or language but also by intersecting social categories like class, education, and migration background. While insider researchers may benefit from contextual familiarity, they also risk intellectual isolation or being confined to studying their own communities.

Evaluation inequity through trustworthiness is recognized as another type of dilemma [Rallis et al. 2007; Taquette et al. 2022]. Rallis et al. [2007] argue that evaluating a study's trustworthiness requires attention to ethical principles beyond methodological formalities. Addressing different biases is crucial for establishing trustworthiness in qualitative research, especially studies involving vulnerable populations such as migrants [Van Liempt & Bilger 2012].

Following the existing literature, this study explores the researcher's dilemmas in interpreting voluntary withdrawal or self-selection bias not only as a challenge to reduce the number of participants [Ngozwana 2018; Markova 2009], but also further examines the intention behind such withdrawal, suggesting that self-exclusion may in itself yield meaningful insights, particularly in sensitive research areas such as migrants' trust.

In parallel, while the narrative nature of qualitative data has been widely acknowledged as central to enhancing data richness and authenticity [Ellis 2017; Ahmad 2022; Zabko 2024], the role of inconsistencies within narratives remains underexplored. This study addresses that gap by analysing contradictions in participants' accounts not as flaws to be corrected, but as revealing the tension between public discourses of trust and private experiences of exclusion. Echoing Sølvberg and Jarness [2019], such inconsistencies are interpreted as expressions of negotiation, concealment, or strategic silence, shaped by the research encounter itself, including the positionality of the interviewer and the sociopolitical context of disclosure [Roulston & Shelton 2015; Sølvberg & Jarness 2019].

2. Research design

This exploratory study examined trust in public services among female migrants from an Asian collectivist culture, residing in a Nordic country. Some information in this paper was not included as predefined research questions in the participant information notice. To maintain ethical standards, avoid cultural stereotypes, and ensure privacy, the identities of the ethnic and host countries have been anonymized. Recruitment was carried out through Facebook groups, where both participants and the interviewer were members. Interviews were conducted in the native language by an experienced female researcher sharing their ethnic and linguistic background. Interviews were tailored to participants' comfort, often held in informal settings like cafés, and conducted in their native language to foster openness. To complement peer review and cross-gender approach, interviews were analysed in collaboration with a male researcher, following Rodríguez-Dorans [2018].

Sessions began with open-ended prompts and gradually shifted toward specific experiences with public services. To minimize methodological bias, interviewees were encouraged to speak freely and without interruption, allowing unstructured narratives to emerge naturally. Each interview lasted between 40 and 75 minutes, depending on the participants' willingness to share their experiences. Interviews were audio-recorded with consent and later analysed collaboratively.

Interviews were audio-recorded with consent. To ensure thorough comprehension and alleviate potential research bias, the analysis of words and themes was augmented by a meticulous manual examination of implicit findings. Transcripts were translated into English and analysed collaboratively by two researchers, allowing for reflexive, balanced interpretation. The transcribed data was coded and grouped into broader themes, which represent the main ideas or topics within the data.

3. Implicit findings

This study aimed to examine migrants' trust in public services. However, the low participation rate and inconsistencies in statements suggest the need for greater caution when assessing the trustworthiness of the data.

3.1 Low participation rate

Recruitment for this study targeted a specific migrant group through widely used online community platforms, including some Facebook group pages with up to 2 000 members. Despite being widely circulated, only 21 individuals responded positively after receiving the notice, and 11 eventually withdrew. Some participants cited scheduling conflicts, while others declined further engagement without explanation, indicating possible discomfort or reluctance. Non-responsiveness and withdrawal are considered ethical dilemmas because they reduce the number of participants [Ngozwana 2018; Markova 2009].

While a degree of trust in the researcher, the broader institutional context, or organizations authorizing the study, is essential to participate meaningfully in qualitative interviews and share personal experiences [Shah 2024], the timing of some respondents' withdrawal in this study suggests a possible hesitation rooted in institutional mistrust. Trust is inherently tied to concepts such as risk, vulnerability, reliance, and honesty [Das & Teng 2004]. In the context of migration, this scepticism can be related to their prior or early experiences of surveillance, discrimination, or lack of confidentiality in their countries of origin or host contexts, which may foster persistent wariness toward official institutions [Lenette 2015]. In research settings, mistrust may manifest as withdrawal, refusal, or selective self-censorship, even in ethically approved and participant-sensitive environments [Shah 2024; Essex et al. 2022; Tannenberg 2021]. In examining trust as the focal point of the main study, the authors interpret the low participation and volunteer withdrawal not only as methodological limitations but also as a reflection of deeper trust dynamics.

3.2. Inconsistencies in participants' statements

During the critical analysis of this study, several inconsistencies in participants' narratives were observed. Antin et al. [2015] conceptualize the inconsistencies as "conflicting discourses" that can coexist within a single narrative, highlighting meaning-making's internal tensions and fluidity. Instead of treating these contradictions as mere noise, they advocate examining them as markers of discursive complexity. In this study, the following inconsistent narratives pose analytic challenges but provide opportunities for deeper cultural interpretation.

a) Inconsistency in the perceived concept of trust

Many participants initially expressed trust in government departments and organizations, providing positive responses. However, upon further exploration of their experiences, they highlighted shortcomings in these entities, such as perceived incompetence, unfair treatment, and suspicion regarding official decision-making processes. It became apparent that participants' trust perceptions were more closely linked to notions of privacy and security than to other dimensions of trust, such as competence or transparency. Recognizing this contradiction, the researchers adapted the interview questions to be less structured to let the respondents explain their feelings about different experiences in various situations.

b) Inconsistency in the statement and the existing regulation

Some interviewees (e.g., A and J) who had arrived in Europe through UN-sponsored resettlement programs appeared reluctant to disclose their refugee status, subtly downplaying or avoiding references to it during the interview process. They presented stories that deviated from standard immigration regulations. However, one

of them, in response to the interviewer's follow-up questions, made another claim that was closer to reality and more consistent with immigration regulations. Another participant, who had obtained residency through refugee status, indirectly disclosed the nature of her entry through side remarks and narrative details that appeared inconsistent with official immigration procedures. The researcher's familiarity with the immigration process and the participant's subsequent conversations enabled the interviewer to identify these inconsistencies and presented claims.

c) Inconsistency in formal and informal environments

In some instances, notable discrepancies emerged between participants' informal remarks or chat and their recorded interview responses, particularly in their attitudes toward strategies in the public services. For example, Interviewees B and C expressed multiple grievances during the pre-interview conversation but refrained from voicing any negative statements once the formal interview began. Interviewee B even expressed gratitude toward a public service provider that she had previously criticized in the informal discussion. This incongruity may reflect a form of self-censorship or expression management, influenced by norms of respect and politeness often associated with collectivist cultures. Interviewee F claimed to have a continuous full-time contract for many years, which contradicted the interviewer's knowledge of her short-term and part-time work history. However, the interviewer avoided discussing the discrepancy to respect the interviewee's privacy, in line with research ethics. Feelings of embarrassment and social stigma around receiving financial assistance or having a refugee background prompted participants to conceal this information.

d) Inconsistency in the statement and the real intention

Interviewee A described their decision to settle in the host country as the most significant choice in their life. However, due to the researcher's embeddedness in the same city and immigrant community, prior informal knowledge suggested that the participant had been actively planning to immigrate elsewhere. Such expressions of strong appreciation, when contrasted with indirect, contradictory information, may mislead researchers. In these contexts, expressions of gratitude rather than critique may reflect cultural norms of politeness or respect, particularly within Eastern or collectivist cultures [Sultan et al. 2024; Nkirote 2024]. The interviewee expressed concern about appearing ungrateful to the host country's institutions, reflecting cultural courtesy. This raises questions about the trustworthiness of the data, highlighting the challenge of distinguishing genuine sentiment from culturally influenced self-presentation in qualitative interviews.

4. Discussion

This study explores epistemic challenges in interpreting implicit findings. Particular attention is given to examining the potential biases contributing to the low participation rate and the inconsistencies in participants' responses, influencing trustworthiness. Understanding the complex interaction between different forms of bias is essential to strengthening trustworthiness.

4.1. Self-selection bias in voluntary participation

Voluntary participation is a foundational ethical principle in qualitative research, ensuring respect for autonomy and informed consent [Swain 2025]. However, striving for inclusion while countering self-selection bias poses a significant methodological challenge, particularly in research involving vulnerable or marginalized populations [Shah 2024; Markova 2009]. Self-selection bias occurs when individuals with certain characteristics are more likely to opt in, while others systematically opt out, leading to interpretive limitations.

As previously mentioned, participation in the study remained limited. Although the reasons given varied, the timing and pattern of withdrawal suggest the potential mistrust of authorities or fear of surveillance, often rooted in experiences from participants' countries of origin, can discourage engagement in research perceived as institutional [Shah 2024; Mackenzie et al. 2007; Lenette 2015]. Trust and rapport between the interviewer and the participant are considered critical in qualitative research, not only for obtaining in-depth data but also for creating an open environment that encourages participants to engage with the researcher, particularly in cultural studies [Ahmad 2022; Shah 2024; Lee 2025]. Consequently, the absence of these voices can limit the interpretive depth and reduce the study's ability to fully capture the spectrum of trust-related meaning-making processes [Sølvberg & Jarness 2019]. Researchers must therefore approach non-participation not simply as attrition, but as potentially meaningful data in its own right, an indicator of deeper, often unspoken, dynamics of institutional alienation As Tannenberg [2021] notes, concerns about prestige, social sanctioning, or fear of punishment, can contribute to systematic non-responses and biased answers. These factors not only compromise data quality but may also signal participants' discomfort, distrust, or perceived vulnerability within institutional settings, offering critical insight into the socio-political undercurrents shaping engagement.

4.2. Social desirability as a form of participant bias

Social desirability bias is a well-documented concern in qualitative research, particularly when exploring sensitive topics such as measuring citizens' trust

in government [Tannenberg 2021]. It reflects participants' tendency to present themselves in ways that align with perceived social norms or expectations in interviews [Dubie 2021]. The construct of social desirability bias is increasingly recognized as culturally contingent, differing significantly in expression and impact across multicultural contexts [Teh et al. 2023]. Immigrants often strive to position themselves within the host society, which can lead to subtle understatements of their status and experiences. This can contribute to social desirability bias in how they present themselves during interviews [Yeasmin et al. 2021]. Cultural and linguistic differences may influence how individuals manage impressions, often in ways that are not fully explained by cognitive ability alone. Odendaal [2015] argues that applying uniform corrections for social desirability across diverse cultural groups is inappropriate because the mechanisms driving such bias vary significantly by context. In interview settings, participants may consciously or unconsciously tailor their responses to appear more favourable or avoid judgment, especially in contexts involving cross-cultural dynamics or power imbalances [Carian & Hill 2021; Antin & Shaw 2012].

In this study, several participants frequently presented their experiences in a manner that aligned with socially accepted narratives. For example, some consistently emphasized their gratitude, claimed continuous full-time employment instead of acknowledging periods of unemployment, or avoided identifying as refugees, preferring terms like "foreigner" over "migrant" due to the perceived stigma attached to the latter in some media [Bellovary et al. 2020]. Such behaviours, rooted in concerns about appearing ungrateful or disloyal, may reflect internalized norms shaped by prior experiences with authority or surveillance [Lenette 2015]. Social desirability can create discrepancies between what participants say in different contexts and their true intentions during interviews. Acknowledging these impression management strategies is crucial for interpreting implicit findings with increased reflexivity and sensitivity to context.

4.3. Cultural bias in the interpretation of trust

The examination of trust in government institutions among migrants is complex and sensitive, having dual significance [Quaranta 2024]. It is both the primary phenomenon under study and a crucial aspect of ensuring the trustworthiness of the research process itself.

A substantial body of cross-cultural research highlights significant differences in how trust is conceptualized and practiced across societies. In Western contexts, particularly in Northern European and Nordic countries, trust tends to be more generalized, extending beyond close relationships to include institutions and strangers [Delhey & Newton 2005]. This pattern has been linked to historically strong,

transparent, and fair institutions that promote social cohesion and interpersonal trust [Yamagishi & Yamagishi 1994; Rothstein & Stolle 2003]. In contrast, many Asian societies exhibit a more particularistic form of trust, where individuals primarily place trust in close social networks such as family members, friends, and long-term business partners [Hofstede 1980; Chen et al. 1998]. These distinctions suggest that cultural norms and institutional environments jointly shape how trust is expressed and toward whom it is directed. Given these cross-national variations, studying trust as a research topic carries a heightened risk of cultural bias, especially in cross-cultural contexts where differences in subjectivity, language, and communication may affect data interpretation [Liamputtong 2011]. It can manifest in various ways and relate to participant perception as well as researcher interpretation. As in a cross-cultural study of the term "privacy", Zabihzadeh et al. [2019] found significant variations in how participants from individualist and collectivist cultures conceptualized it. They noted that cultural bias can be pronounced when addressing culturally embedded notions such as trust, respect, and security.

In this study, to mitigate cultural bias, interviews were conducted in participants' native language using open-ended, participant-led formats. The shared cultural background of both the interviewer and data analyst enhanced contextual sensitivity and reduced the risk of misinterpretation. Early interviews revealed that participants often interpreted trust narrowly, focusing on privacy and security rather than broader aspects such as transparency or institutional competence. This prompted a reflexive shift toward a less structured interview style, allowing for a more culturally grounded articulation of trust. While this adaptive approach helped clarify underlying conceptual frameworks, some biases still affected participants' comfort and disclosure, which was reflected in inconsistencies.

4.4. Self-censorship influenced by participant backgrounds

Self-censorship can influence participant disclosure and pose broader challenges to the scientific process by constraining open communication and silencing critical perspectives. As argued by Väliverronen and Saikkonen [2021], self-censorship can affect both researchers and participants, undermining the richness and authenticity of qualitative inquiry. Self-censorship is a measurement challenge in qualitative research that can have psychological, economic, legal, and political reasons [Bar-Tal 2017]. However, it is significantly influenced by cultural context, particularly in settings involving cross-cultural or migrant research. For example, participants from collectivist or hierarchical societies may withhold critical or sensitive perspectives due to ingrained norms around authority, politeness, or fear of consequences, particularly in some Asian cultures [Adikaram 2018]. In such contexts, expressing dissent or mistrust, as sensitive topics, especially toward public institutions, can be

perceived as risky or socially inappropriate. Sosnowska-Buxton [2015] highlights that the interaction between topic sensitivity in interviews and social context often leads to self-censorship, especially when the research setting reveals power imbalances. Shah [2024] suggests that some participants' disapproval, fear of being recorded, and fabricated excuses can conceal larger dynamics. Similarly, Turner [2013], after studying Asian culture, concludes that cross-cultural fieldwork requires heightened sensitivity, as participants may selectively silence themselves to protect personal or group identity.

Respecting the sensitivity in the topic and target group, self-censorship appears to contribute to the inconsistencies observed in implicit findings in this study. Although the interviews are conducted in a democratic context. However, as previous studies have highlighted, even in democratic contexts, societal norms and dominant ideological values can give rise to self-censorship, shaping individuals' willingness to express dissent or critique within institutional frameworks [e.g., Brutāne & Petkeviča 2022]. Migrant studies show that self-censorship is common among migrants and refugees who have experienced authoritarian regimes [Mackenzie et al. 2007; Lenette 2015]. In authoritarian settings, respondents often engage in "preference falsification" out of fear of consequences, particularly when anonymity is uncertain. These dynamic raises serious concerns about the reliability of interview data in such contexts, as noted by Kuran [1997].

4.5. The researcher's bias and ethical dilemmas

Rather than treating bias as a flaw to be eliminated, Roulston and Shelton [2015] suggest that bias in qualitative research is inextricably linked to researcher subjectivity and can serve as both a constraint and a source of insight. In cross-cultural contexts, this subjectivity becomes particularly pronounced. When the researcher's cultural background differs from that of the participants, interpretations may unconsciously reflect the researcher's own values and assumptions, a phenomenon known as cultural bias [Creswell & Creswell 2018; Liamputtong 2011]. Misalignment in cultural frameworks can lead to misrepresentation of participants' perspectives and, ultimately, undermine the credibility and transferability of findings [Squires, 2009]. When a study investigates a sensitive topic such as trust in public services among culturally diverse and vulnerable participants, the task of assessing the trustworthiness of the data becomes significantly more complex and demanding for researchers, due to the heightened risk of multiple, often overlapping, forms of cultural bias [Adikaram 2018; Shah 2024].

Implicit findings of this study uncovered various biases behind inconsistencies in participants' narratives. In this context, the interviewer encountered situations where participants' statements deviated from established factual information.

Table 1: Ethical dilemmas in qualitative research

Researcher positionality	Ethical implications	Trustworthiness
The junior researcher may not recognize the inconsistency or remove the suspicious inconsistent data	High research ethics (confidentiality)	Low trustworthiness (unreported bias)
The researcher acknowledges the inconsistency as a limitation in the study.	High research ethics (confidentiality)	Low trustworthiness (unaddressed bias)
The researcher pressures the participant or uses leading follow-up questions to elicit the "truth".	Low research ethics (violates informed consent)	High trustworthiness (factual accuracy, but ethical integrity is compromised)
The researcher verifies facts through external sources and reports them without participants' consent.	Low research ethics (violates informed consent)	High trustworthiness (keeping high data accuracy but undermining legitimacy)

Table 1 illustrates the researcher's positions in trade-offs between critical conflicts and those aimed at increasing analytical trustworthiness, like verifying for inconsistencies or validating data externally. The study highlights an imbalance of power in the informed consent process when researchers possess a deeper understanding of the participants' context than the participants [Fujii 2012; Ellis 2017]. In these situations, researchers have access to additional information that could help identify inconsistencies. However, ethical principles, such as informed consent and conditionality, restrict their ability to use this information to increase trustworthiness, creating a dilemma (see Table 1).

Researcher practices in managing bias highlight the epistemological and ethical challenges in interpreting data findings in cultural research. When ethical implications and trustworthiness conflict (Table 1). This poses a dilemma for researchers. Given the important role of the researcher in fostering trust in data and affirming research ethics, researchers must be aware of these dilemmas.

5. Conclusions

Emphasizing the researcher's position, this article examines a complex ethical dilemma in research in which achieving trustworthiness conflicts with other ethical principles such as confidentiality and informed consent. It highlights that some participants' accounts were intentionally crafted to obscure or avoid factual disclosure. These narratives may be shaped by feelings of discomfort, a desire for self-protection, or a sense of mistrust. These are not merely vague statements, but

ethically sensitive instances of false or selectively framed information that cannot be simplistically reported, ignored, or titled as the limitation of the study. In such cases, the researcher's positionality is crucial for enhancing research credibility and minimizing misinterpretation.

The study suggests utilizing implicit findings regarding the meaning-making from participants' reactions, silences, and words that lie beyond the boundaries of informed consent and verifiability, which are ethically complex to examine in analysis. It adds a new aspect to the existing literature by recognizing that trust is not only a subject of inquiry but also a condition that shapes the trustworthiness of participants' narratives, which could be perceived as indicators of trust or distrust. Further, while previous studies have identified participants' withdrawal as an ethical dilemma [e.g., Ngozwana 2018], some other studies interpret this phenomenon as a fear or discomfort in sharing information [e.g., Shah 2024]. Our discussion goes a further step and suggests concepts of withdrawal and refusal to participate as they relate to trust and mistrust when studying public trust in government.

As an implication, the study suggests that a uniform template for informed consent may not adequately address all ethical dilemmas, especially when researchers need to make sense of implicit data. It highlights a critical need for ethics oversight bodies to provide clearer guidance in navigating unforeseen ethical considerations during data interpretation. It highlights a critical need for ethics oversight bodies to provide clearer guidance in navigating unforeseen ethical considerations during data interpretation.

This study contributes to ongoing debates about ethical dilemmas, especially regarding trustworthiness, informed consent, and researcher positionality, while placing greater emphasis on inconsistent narratives in interpretations. It also contributes to broader discussions on how trust is conceptualized, measured, and interpreted in migration-related research. It challenges researchers to drive meaning-making from unexpected results or implicit findings, rather than reporting them as limitations.

The study analysed implicit and emergent findings beyond the original research focus and consent framework. The researchers in this study employed various strategies to minimize biases, such as peer review, participant-led narratives and flexibility, empathetic interview settings, and verbatim analysis. The authors do not claim to identify all forms of inconsistency and bias. There are numerous sources of bias, ethical dilemmas, and paradoxes, many of which are beyond our control and unavoidable. To build on these insights and address the limitations mentioned, future studies should implement more purposeful designs and explicit consent to explore these dynamics in greater detail and with reduced uncertainty.

Acknowledgments

This research was supported by the Trust-M project (Decision number: 353510), funded by the Strategic Research Council at the Research Council of Finland (Suomen Akatemia).

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ISLAMIC AND ARAB FEMINISM AS AN ELEMENT OF WOMEN'S IDENTITY CONSTRUCTION

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Abstract

This article investigates the development of Islamic and Arab feminism as frameworks for constructing women's identity in the 20th and 21st centuries. It distinguishes between Islamic feminism, which operates through the reinterpretation of sacred texts such as the Qur'an and Hadith, and Arab feminism, which is more often embedded in secular, nationalist, and postcolonial discourses. It explores how Arab women writers have negotiated between religious tradition and feminist agency, producing hybrid models of identity that bridge the personal and the political.

Tracing the evolution of feminist thought through four historical waves, the research highlights thematic developments such as legal rights, education, intersectionality, and digital activism. Particular attention is given to the reinterpretation of patriarchal concepts like *qiwāma*, the reclamation of religious authority by female scholars, and the role of literature in amplifying women's voices.

The article argues that both Islamic and Arab feminisms challenge hegemonic Western feminist narratives by offering culturally embedded alternatives rooted in lived realities and theological introspection. These feminist movements do not reject religion but instead aim to harmonize faith with gender justice, making them powerful vehicles for societal transformation.

This study contributes to global feminist scholarship by presenting a nuanced, interdisciplinary approach to identity construction, one that foregrounds agency, tradition, and transformation in equal measure.

Keywords: *feminist waves, interaction, religion, tradition, Arabic literature, Islamic feminism, Arab feminism*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.579

ISSN 2500-9974

CULTURE CROSSROADS

Introduction

The evolution of feminism has been marked by successive "waves" that have continually reshaped cultural paradigms, intellectual discourses, and methods of inquiry. In the second half of the 20th century, the second wave of feminism significantly transformed global attitudes toward gender roles, laying the foundation for civil liberties and gender equality that are now frequently taken for granted. While rooted in Western liberal and socialist traditions, feminist discourse also resonated within non-Western societies, including the Arab world, where it was reinterpreted through specific cultural, religious, and political lenses.

In the Arab context, feminist thought evolved more gradually, facing resistance from entrenched patriarchal norms, colonial legacies, and religious traditions. Yet, despite these challenges, Arab women authors and intellectuals developed a distinct feminist discourse that addressed the complexities of identity, agency, and social transformation within Islamic and Arabic frameworks. This study explores how Arab feminist voices rearticulate global feminist ideals in ways that remain culturally resonant and contextually grounded. Attention is given to the reception and transformation of Islamic feminism – a strand of thought that reinterprets Islamic texts to promote gender justice. The article highlights how concepts such as intersectionality, interdisciplinarity, and literary activism are embodied in the works of authors like Nawal El Saadawi, Fatima Mernissi, and Huda Shaarawi.

Furthermore, the article traces the four waves of feminism, not only as chronological movements but as evolving epistemologies that reflect shifting understandings of gender, power, and cultural belonging. The central hypothesis tested is whether feminism, originally rooted in Enlightenment and Western secular ideologies, has developed a culturally embedded, Arab and Islamic specificity. This is reflected in the ways Arab feminist writers reconcile traditional family values with the expanding roles of women as social, intellectual, and political agents. By bridging religious ethics and feminist principles, these writers challenge monolithic representations of Muslim women and offer alternative models of female identity and empowerment.

1. The idea of feminism

The term "feminism" comes from the Latin word *femina*, meaning *woman*. Feminism[1] has played as positive a role in women's lives as liberalism and the ideals of freedom have in the lives of individuals and entire nations. The Dictionary of

[1] I deliberately pluralize the term *feminism* to acknowledge that there are multiple feminist theories and movements, which I will discuss in the text. These movements are so diverse that "it is impossible to speak of feminism in terms other than the plural."

Foreign Terms provides two definitions of feminism: a women's movement advocating equality with men and an ideology that demands equal rights for women [Baldunčiks 2007]. The Oxford Dictionary defines *feminism* as a state of femininity. Webster's Dictionary defines *feminism* as the principle that women should have the same political rights as men.

Feminist theory refers to a worldview that engages with critical intersectional perspectives. Feminist theory is a "deeply collective" practice that reflects a shared "politics of engagement" [Mohanty 2003: 122]. Feminists agree that women face social and/or material inequalities simply because of their biological identity and are committed to addressing these issues. This is a challenge, but there are many ways in which such challenges can be addressed in different contexts [Pilcher, Whelehan 2004: 48].

The theoretical basis for feminism is found in the work of Swiss lawyer J.J. Bachofen, *Mother Right*, which presents the idea of a matriarchy in prehistory. Social Democrat A.F. Bebel, in *Woman and Socialism* (1879), argues that the political liberation of women is closely linked to the abolition of exploitation and the social yoke. In the 19th century, men were also involved in the struggle for women's suffrage. For example, the writer John Stuart Mill wrote *The Subjection of Women* under the influence of his wife [Walters 2010: 94]. Patriarchal thinking has convincingly attributed fixed and universal natures to women, a concept referred to as the "myth of eternal femininity" [Beauvoir 2011: 12]. Men define the world from their point of view, which they confuse with absolute truth [Beauvoir 2011: 162]. In order to define the masculine perspective, the other must be imagined to serve as a basis for contrast. However, feminism, in its early stages, was primarily concerned with women's political and legal rights; and this interest has now become only a small part of what feminism seeks to achieve today [Caine 1997: 2].

Feminist ideas have evolved over the last three centuries, but "what feminism means or entails is a complex question without a definitive answer" [Caine 1997: 2]. Feminist movements worldwide have undergone historical periods with different ideologies. The best way to understand feminism is through "cumulative knowledge" of "socio-political changes" in women's lives and how these changes have developed across cultures [Offen 1988: 57]. Historians and theorists seek a framework for their theories and interpretations [Offen 1988: 121].

History shows that women have been subordinated, lacking the means to reclaim their identity, until they illuminate and renew it through their experiences. "How much does 'matter matter'?" [Barad 2007: 64]. Materialist feminists shift the focus from narrative to technology, labour division, objects, and events. They challenge the primacy of narrative, emphasizing "textual repetitions" and problematizing subjectivity and the processes of knowing and speaking [Hemmings 2011: 192].

The feminist program is based on criteria including physical enfranchisement, intellectual, moral, and social emancipation [Bouten 1975: 2].

Feminism's history is divided into four waves: the first wave in the late 19th and early 20th centuries, the second in the 1960s and 1970s, the third from the 1990s to the present [Krolokke, Sorensen 2005: 1], and the fourth wave today. The term "wave" is a metaphor, with second-wave feminism building on the ideas of the first wave [Bailey 1997: 20]. However, this metaphor can conflict with how third-wave feminists characterize feminism, as it overlooks key issues and priorities, undermining the continuity across "waves". The common themes of each wave should be recognized, while also acknowledging the diversity of feminist ideas during these periods, which should not be equated with the entire history of feminism, but viewed as distinct historical periods of feminist movements [Mann, Huffman 2005: 58].

1.1. First wave (late 19th–early 20th century)

The first wave of feminism emerged between the 19th and early 20th centuries in England and America [Krolokke, Sorensen 2005: 24]. The first major work on women's rights was Mary Wollstonecraft's *Vindication of the Rights of Woman* (1792), which was initially ignored and later forgotten [Krolokke, Sorensen 2005: 16]. It was inspired by the French Revolution. The author described women's lives under male dominance, highlighting their psychological and political captivity, as well as their exclusion from the public sphere. Wollstonecraft is a significant historical figure who influenced both literature and the development of women's rights movements [Wollstonecraft 1993: 97]. Feminism is about more than just changing the world. It means a changed psychology and the creation of a new consciousness [Rowbotham 2011: 33].

Using fiction writing as a powerful tool for change, women novelists declared war on patriarchy [Ghandeharion 2017: 6]. The focus was on women's rights, including voting, education, property ownership, and labour rights. In the early twenty-first century, an increasing number of women began exercising political power [Hawkesworth 2012: 1]. In the United States, the first wave of feminism achieved its goal with the 19th Amendment to the Constitution in 1919, granting women the right to vote in all states [Freedman 2002: 463].

1.2. Second wave (1960s–1980s)

The second wave of feminism arose from leftist movements in the U.S., Britain, and Europe, opposing the relegation of women to second-class status [Clercq 2013: 15]. With generational shifts and transnational perspectives, focus moved from a singular "global" viewpoint to specific "unions" beyond national borders [Grewal 2005: 22]. Both World Wars aided women's struggle for rights as they assumed

economic and agricultural roles during men's absence. Feminist visibility also grew through European conferences.

This wave scrutinized patriarchal elements in literature and culture, revealing their role in reinforcing or challenging women's oppression [Tyson 2014: 83]. It sought to combat oppression, promote social equality, and dismantle patriarchy. Gender contradictions reflected social realities, recognizing natural differences yet fundamental sameness between sexes [Nicholson 1997: 1–3]. The second wave was credited with "removing social barriers" limiting women's lives [Clercq 2005: 7].

Feminist expression flourished in Western and Eastern poetry, novels, theatre, and film. Despite the absence of formal groups in Poland and Romania, notable female writers contributed significantly [Matynia 2005: 4]. Key issues included sexual freedom and reproductive rights, notably after the 1960s introduction of contraceptive pills.

Betty Friedan's *The Feminine Mystique* (1963) revealed women's dissatisfaction with constrained roles, igniting U.S. feminism [Rottenberg 2013: 420]. In the East, Nawal El Saadawi's *Woman at Point Zero* (1975) depicted a woman's resistance to patriarchy and quest for autonomy [Saadawi 1980]. Fatema Mernissi's *Beyond the Veil* (1975) critically examined gender in Muslim societies, emphasizing women's status in Islamic culture. These authors demonstrate that feminism cannot be understood without acknowledging complex social, political, and economic changes women experienced [Caine 1780–1980: 14]. A feminist viewpoint anchored in a specific culture or era cannot serve as a universal model [Offen 1988: 119]. Egyptian feminist Huda Shaarawi's autobiography *Harem Years* (1987) chronicles her life and women's rights struggle, while Lebanese-American Etel Adnan's *Sitt Marie Rose* (1977) explores war's impact on women's identities.

The second wave aimed to challenge and deconstruct patriarchal structures across society, culture, and academia, being "feminist in nature, focusing on helping students bridge the gap between the personal and the political in academic contexts" [Hassel, Nelson 2012: 144]. From this emerged gender studies – centred on recovering women's marginalized contributions in employment, education, and domestic life [Maynard 2004: 29]. This field sought to disrupt hierarchical educational practices [Hassel, Nelson 2012: 144].

Gender studies highlighted marginalized lived experiences, questioning what it means to live a gendered life, whether masculine or feminine, thus challenging patriarchy with an inclusive approach [Darder 2003: 16]. It critiqued canonical knowledge forms, such as the "dead white male" canon, connecting lived experiences with broader social and political issues like labour, domesticity, and power [Cranny-Francis et al. 2003: 112]. Women's studies used individual experiences to analyse structures that upheld patriarchy within and beyond academia [Hassel, Nelson 2012: 144].

Feminist activism and scholarship fostered gender studies' growth. Educational theorist Carmen Luke argued that feminist critical pedagogy problematizes "gender" by constructing a masculinist subject, complicating emancipation theoretically and practically [Luke 1992: 25]. This perspective also emphasized intersections of economic, cultural, and social resources, calling for inclusion of gender, class, and racial oppression [Jenway 2001: 60].

However, Elizabeth Ellsworth critiqued this, asserting critical pedagogy's language perpetuates "repressive myths" sustaining dominant relations [Ellsworth 2013: 188]. She questioned the homogenizing discourse of oppression, asking: "What in diversity are we silencing in the name of a 'liberating' pedagogy?" [Ellsworth 2013: 188]. This led to critical pedagogy's characterization as a "very boy thing", with a masculine rhetorical stance of "he who knows" [Lather 1988: 488]. Such critique is crucial in feminist analyses of higher education, exposing privilege and objectivity embedded in knowledge structures shaping curricula. In the Arab world, feminist works were vital for liberation against autocratic power rooted in state and family authority [Saadawi 2009: 352].

1.3. Third wave (1990s–2000s)

At the core of third-wave feminism lies a generational division, alongside key features such as a critical approach to gender and identity, intersectionality, and a global outlook [Rupp, Taylor 1999: 363]. This wave emphasizes an intersectional framework promoting an ethic of "radical interconnectedness", where difference is met with curiosity and respect [Keating 2009: 89]. By highlighting diverse experiences across race, class, sexuality, and other axes, intersectionality challenges dominant social imaginaries and invites intervention in historical memory [May 2015: 53].

Third-wave post-feminism critically addresses the limitations of the second wave, which often imposed rigid categorizations on women and overlooked significant intra-group differences [Snyder 2008: 175]. Unlike its predecessor, third-wave feminism rejects the notion of a singular "female identity", advocating instead for pluralism and self-determination, enabling all women to negotiate equality and liberation regardless of difference [Dicker, Piepmeier 2003: 9; Snyder 2008: 175].

This period's postfeminism calls for a more pluralistic, diversified feminist discourse, emphasizing the inclusion of marginalized voices absent from prior waves. Key contributors include Susan Muaddi Darraj, Rene Denfeld, Andrea Dworkin, Susan Faludi, Daisy Hernandez, Catharine MacKinnon, Camille Paglia, Bushra Rehman, Katie Roiphe, Rebecca Walker, and Naomi Wolf [Snyder 2008: 256].

A pivotal figure is Kimberlé Crenshaw, a founder of intersectionality theory, who contends that intersectional thinking – an open, critical approach to power – cultivates resilient knowledge and involves interdisciplinary and activist

efforts [May 2015: 11; Hancock 2016]. This approach expands feminist work's scope, fostering solidarity across movements while critiquing systemic power structures.

1.4. Fourth wave (2010s–present)

Feminist Kira Cochrane argues that the fourth wave of feminism began in 2013 in response to gender-based violence, with technology playing a key role in spreading feminist ideas through online platforms [Cochrane 2013]. This wave saw transnational feminist movements emerge in countries such as Afghanistan, Bangladesh, and India [Cochrane 2013: 18].

The #MeToo movement, founded by Tarana Burke in 2006, brought attention to sexual violence, particularly affecting minority women. It highlighted the prevalence of sexual and gender-based violence and gained global traction, fuelling fourth-wave feminism in countries like Brazil, Japan, and South Korea [Jaffe 2018: 83; Perez, Ricoldi 2024: 301]. The literature of the fourth wave covers topics such as gender studies, cultural critique, and critical race theory, focusing on social justice and revolutionary change [Perazzone 2023: 595]. Feminism is now seen as a mass movement addressing liberation beyond women, considering racial and class differences and the need for political liberation across borders [Rudan 2023].

The fourth wave also tackles issues of Muslim women's rights, contested by global masculinities and power dynamics over women's bodies [Huma 2008]. Campaigns like #TimesUp and #EverydaySexism continue to address gender inequality and sexual violence.

This wave builds on previous ones, confronting their limitations, and emphasizes feminist solidarity based on shared experiences and empathy, promoting a more inclusive and intersectional feminism [Biana 2020: 23].

2. Elements of the Islamic feminist construction of women's identity

To ensure conceptual clarity, it is important to distinguish between Islamic feminism and Arab feminism. While both engage with gender equality in Muslim contexts, they differ in ideological foundations, socio-cultural frameworks, and modes of expression. Islamic feminism, a socio-religious and intellectual movement rooted in Islamic tradition, argues that gender equality is inherent in Islam. It calls for reinterpretation of the Qur'an and Hadith to counter patriarchal readings shaped by historical contexts. Scholars like Amina Wadud, Fatima Mernissi, and Ziba Mir-Hosseini challenge concepts such as *qiwāma* – often read as male superiority – and promote "ethical, gender-sensitive hermeneutics" [Mace 2015; Mir-Hosseini 2014]. Yet, its internal contradictions remain debated [Abdallah 2017: 216].

Islamic feminism emphasizes reinterpretation of sacred texts from women's perspectives. Fatima Mernissi argues many discriminatory hadiths stem from political

agendas, not prophetic teachings. She stresses the need to assess their authenticity and socio-historical context. Feminists in this tradition claim the right to interpret religious texts, assume spiritual leadership, and participate in civic life, redefining women's roles in Islamic society.

In contrast, Arab feminism developed within Arabic-speaking societies as part of secularist, nationalist, and anti-colonial discourses. Though encompassing both secular and religious elements, it often critiques patriarchal structures and emphasizes women's intellectual agency and activism. Leading voices include Huda Shaarawi, Nawal El Saadawi, and Etel Adnan, whose work bridges national and global feminist concerns. Arab feminist texts may also invoke Islamic discourse to critique gender norms while asserting cultural identity [Badran 1996: 240; Ghandeharion et al. 2017: 6; Gohar 2016: 174].

Huda Shaarawi's 1928 public challenge to gender norms marked a pivotal moment [Cooke 2006: 568], though the movement encountered friction between Ottoman traditions and European modernity [Golley 2010: 27]. Islamic feminism, by contrast, critiques colonialist narratives of "saving Muslim women", promoting a decolonized historiography [Abdallah 2012: 53; Mbembe 2017].

By the 1970s, theorists like Nawal El Saadawi emerged, critiquing both religion and Western feminism. Her work provoked conservative backlash but emphasized indigenous feminism grounded in Arab women's lived realities [Cooke 2004: 76; Golley 2010: 4; Saadawi & Wilmuth 1995: 441]. The shift of women from private to public spheres – such as corporate and governmental roles – was paralleled by an increase in gender-critical literature that interrogated the socio-economic structures of gender [Zuhur 2001: 78]. Feminism in this context is viewed both as a product and a driver of social and literary transformation [Offen 1988: 119].

2.1. Role of Islamic feminism in society and culture

By reinterpreting Islamic texts, Islamic feminists reshape perceptions of women's roles, advocating for education, economic independence, and political participation while respecting religious tradition. They restore women's voices in Islamic discourse, offering interpretations that promote gender equality and active societal roles [Akbar Akhgari 2020].

Key themes include education, as Islamic feminism stresses equal access to knowledge, reviving the legacy of female intellectuals [Sadiqi 2025]; economic independence, affirming women's rights to property and financial autonomy [Sirri 2024]; and political participation, challenging restrictions on women's roles in decision-making [Sirri 2024]. Islamic feminism critiques patriarchal norms misattributed to religion, advocating for women's rights within an Islamic framework without questioning the faith itself [Akbar Akhgari 2020].

2.2. Patriarchy structures and religion

Islamic feminism argues that patriarchal structures limiting women's roles in religious and social spheres are rooted in cultural traditions rather than authentic Islamic teachings [Svensson 2000]. Feminists contend that Islam originally granted women greater rights, which were later restricted by patriarchal norms. They call for accurate interpretations of religious texts that uphold justice and gender equality [Gray 2013].

Key concerns include women's access to education and employment. Although Islam supports knowledge for all, societal barriers often prevent women from reaching their full potential. Feminists demand equal education opportunities to empower women in shaping their futures and participating in public life [Abdali 2023].

Another critical issue is women's inheritance rights. While Islam grants these rights, cultural norms frequently undermine them, limiting women's economic independence [Gray 2013]. Feminists advocate for full recognition of women's financial autonomy, including inheritance, employment, and entrepreneurship [Abdali 2023].

Islamic feminism challenges religious and cultural justifications for gender-based violence, advocating for stronger protections, education, and shifts in societal attitudes [Sirri 2024]. It also calls for women's equal participation in political and public life, demanding inclusion in decision-making and activism [Svensson 2000].

2.3. Self-determination and subjectivity

In the context of Islamic feminism, self-determination is vital for empowering women to make decisions aligned with their personal values and goals [Anwar 2006]. This includes autonomy in societal roles, education, relationships, and careers, free from external pressures. Women's choices should reflect their unique preferences and capabilities, deserving both respect and support [Ali 2000]. Crucially, autonomy must harmonize with Islamic teachings [Skah 2014].

Women are entitled to make free choices in areas such as education, marriage, and family, which fosters both personal fulfilment and societal development [Oladi 2024]. Islamic feminism proposes a new model of female identity that merges religious commitment with individual rights. Unlike traditional frameworks that confine women to familial roles, this model promotes a multidimensional identity – encompassing roles as mothers, wives, and active public participants [Anwar 2006].

This framework allows women to live autonomously within their faith [Oladi 2024]. Islam affirms women's right to freedom and individual choice, provided these align with religious principles [Ali 2000]. Islamic feminists argue this balance enables women to realize their potential without compromising their faith [Skah 2014],

presenting self-determination as the ability to follow a path shaped by both personal values and religious beliefs [Anwar 2006].

Subjectivity plays a central role, emphasizing a woman's awareness of her needs, desires, and goals [Oladi 2024]. This challenges traditional limitations and repositions women as active agents with the right to spiritual and personal development beyond gender-based restrictions [Skah 2014]. Islamic feminism thus contributes to a global feminist movement that defends women's rights while respecting cultural and religious traditions, integrating feminist principles with Islamic ethics [Ali 2000].

2.4. Building a dialogue between Western and Islamic feminist approaches

Western feminist theories often promote universal values presumed to be applicable to all women, regardless of cultural or religious background. However, such universality has been critiqued for being rooted in Western sociocultural norms that do not always translate across global contexts [Shaikh 2003; Tohidi 2003: 160]. As Hirschmann observes, "calls for cross-cultural dialogue may seem naive given the history of Western dominance, but they remain essential for a more inclusive feminist praxis" [Hirschmann 1998: 352].

Islamic feminism offers an alternative framework by integrating feminist principles with Islamic values and traditions. Rather than rejecting the notion of gender equality, it reinterprets it through a religious lens, asserting that women's rights can be grounded in Islamic identity and communal norms [Moghadam 2002; Bahi 2011]. According to Moghadam, Islamic feminism "opens up a dialogue between religious and secular feminists, where reinterpretations of texts are made alongside recognition of universal standards" [Moghadam 2002].

This approach enables a more culturally responsive feminist discourse, promoting mutual respect and meaningful engagement across ideological divides. Ehsan argues that Islamic feminism should not be viewed as a deviation from feminist norms but rather as "a contextualized form that aligns with religious identity and communal values" [Ehsan 2023]. In doing so, it fosters collaborative efforts among women from diverse religious and cultural backgrounds on issues such as justice, equality, and human dignity [Al-Hibri 1999].

Islamic feminism also prioritizes the balance between women's autonomy and the preservation of religious and cultural integrity. Crabtree and Husain describe this dialogical approach as a platform for reconciling secular and faith-based visions of justice through mutual recognition and intellectual respect [Crabtree & Husain 2012]. Rather than imposing a single normative model, it invites plurality in understanding gender rights and social justice.

Moreover, Islamic feminism engages critically with issues such as veiling, education, employment, and inheritance, acknowledging their varied interpretations

across Muslim societies. Shaikh suggests that "instead of imposing one model, dialogue should allow different feminist approaches to converge in addressing shared issues from diverse standpoints" [Shaikh 2003]. In this way, Islamic feminism contributes to women's empowerment without compromising religious commitments, resisting both cultural essentialism and secular universalism [Ahmed-Ghosh 2008; Ahmed 2012].

2.5. Global challenges and solidarity

The global feminist movement plays a central role in addressing gender inequality across borders, with Islamic feminism contributing a contextualized, faith-conscious perspective that enriches intersectional solidarity. As Petersen observes, Islamic actors "translate global gender norms into culturally appropriate practices through a lens of Islamic solidarity" [Petersen 2018: 206].

Islamic feminism frames women's rights as a global issue, calling for locally grounded yet internationally connected activism [Vargas 2003: 913; Ahmed-Ghosh 2008: 104]. As Vargas notes, "we are a global solidarity movement, united in our diversity (...) integrating gender justice with economic justice" [Vargas 2003: 913].

It aligns with broader feminist struggles against violence, poverty, and unequal access to education, especially in the Global South [Al-Ali 2020: 310]. The movement also critiques dominant feminist epistemologies by offering a culturally embedded, religiously grounded vision of gender justice. As Weldon observes, "the movement against gender violence has achieved transnational cooperation through shared feminist norms rooted in solidarity" [Weldon 2006: 457].

Islamic feminism challenges patriarchal interpretations of religion, linking core principles like *tauhid* to human rights efforts [Robinson 2020], and reaffirms women's rights to education, work, and political participation [Ahmed-Ghosh 2008: 106].

Conclusions

This article has shown that Arab and Islamic feminisms, though interconnected, stem from distinct socio-political and intellectual contexts. Arab feminism often emerges from nationalist and postcolonial movements, while Islamic feminism is grounded in religious discourse, seeking to reinterpret sacred texts through gender-equitable hermeneutics.

The study confirms the central role of Arab women writers in fostering culturally grounded feminist consciousness. Their works resist the notion that feminism in Arab societies is merely a Western import. Saadawi's *Woman at Point Zero* critiques social and religious constraints, while Mernissi's *Beyond the Veil* reclaims Islamic sources to advocate for women's autonomy, demonstrating how literature serves as a space of resistance and redefinition.

By tracing feminism's four waves, the article highlights its evolution from suffrage and education to contemporary debates on identity, intersectionality, and digital activism. This diachronic lens illustrates that feminist discourse is dynamic, shaped by political, religious, and technological change.

Islamic feminism, in particular, counters orientalist and colonial narratives by advancing gender-just interpretations of Islam. Scholars such as Amina Wadud and Ziba Mir-Hosseini critically re-evaluate concepts like *qiwāma* to align with contemporary ethics of justice and equality.

The study also redefines female subjectivity: women emerge not as passive objects but as agents shaping religious knowledge, political structures, and cultural narratives. Islamic feminism promotes a multidimensional female identity rooted in spirituality, intellectual autonomy, and civic participation.

In sum, Arab and Islamic feminisms contribute to a decolonial, pluralistic model of gender justice. They expand the global feminist lexicon and offer an ethical framework affirming both religious belief and gender equity. Arab and Muslim women's identities are thus reimagined through indigenous voices, demonstrating that feminism can thrive within, rather than outside, Islamic and Arab cultural traditions.

Acknowledgment

The publication is financed by the Recovery and Resilience Facility project "Internal and External Consolidation of the University of Latvia" (No. 5.2.1.1.i.0/2/24/I/CFLA/007)

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POST-EXILE RETURN NARRATIVES: EMPATHY OF THE NOVEL *MAYBE IT WAS* BY AINA VĀVERE AND BRAVE-HEART OF THE NOVEL *CRAVING FOR SUNRISE* BY JĀNIS KLĪDZĒJS

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Abstract

The article focuses of return narrative in Aina Vāvere's (1924–2011) novel *Maybe It Was* (1992) and Jānis Klīdzējs' (1914–2000) novel *Craving for Sunrise* (1995). These works show an imaginary landscape of post-exile writers shortly before the Third Awakening and establish the idea of returning to homeland. The term post-exile is used in this article to refer to the end of displacement and achieving national goal of exile – the restoration of Latvian independence. It also marks the formal end of exile [Bannasch et al. 2020]. This allows us to look at the transition as former exile writers search for new themes and portrait meeting with Latvian post-Soviet society. The post-exile concept lacks a specific methodology, so the article uses a postcolonial approach to analyse texts. The structural similarities of the novel's narrative by different writers appear in post-exile literature. It contained three parts: history of exile, first impressions in Latvia during the Third Awakening, and choices of return. These three narrative parts will form a genre of return novels. The first writers of this narrative were Aina Vāvere and Jānis Klīdzējs, who placed the future of exile at the centre of their works. Their works depict a generation that was either born or grew up in the Latvian exile community, with a sense of belonging inherited from their parents. It refers to forming the hybridity of new transcultural expressions and identities [Bhabha 1994].

Keywords: *post-exile, Third Awakening, postcolonial studies, hybridity, diaspora*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.556

ISSN 2500-9974

CULTURE
CROSSROADS

Introduction

In 1969, German literary scholar Walter Berendsohn, in his introductory remarks at the International Congress in Stockholm on *German Literature of the Exiles of the Third Reich*, emphasized that the study of *Exilliteratur* cannot be limited to the period from 1933 to 1945. He expressed that "literary history must deal with the literary works themselves and that to the present-day exile writing had been intrinsically different from nearly everything written". The researcher of the history of exile, Helmut Müssener, expressed the idea, that "the history of exile literature would not be terminated until its last representative in exile had died or had returned to his native country". [Rosenfeld 1982: 333]. Both arguments support the idea that exile literature should be studied in conjunction with historical experience, from which the influence of the writer's self-identity on literature also emerges. Edward Said uses musical term to described exile notion – *contrapuntal* (the relationship of two or more simultaneous musical lines); he writes: "what is true of all exile is not that home and love of home are lost, but that loss is inherent in the very existence of both" [Said 1988: 191]. Or with physical return from exile to homeland is possible to rediscover the roots of self-identity and "acceptance of the dual identity formed during exile" [Tamba & Harahap 2024: 94].

Exile ends with the opportunity to return to the homeland, usually facilitated by an improvement in the political situation or democratic processes. In that case, a two-way process takes place: the exiles encounter the changes of cultural space that they left behind, as cultural space encounters the exiles, who have changed. Therefore, it is necessary to record both changes and characterize the future potential of this contact. These issues become themes in the post-exile culture.

The feminist and cultural researcher Amy Kaminsky argues against adding the suffix "post" to exile, stating that "every "post" contains what it purports to supersede, always marked by the term whose decadence it reports. The more colloquial "after" also registers perpetuation in change, strangely denoting the pursuit of the original term" [Kaminsky 1999: 3]. Karin Berkman writes that exile is not initially detached from the post-exile state; it can only be fixed with a time delay. "Exile constantly beckons to post-exile, and both figure as stations on a continuum rather than as antithesis. Exile, then, constantly proclaims its finitude and is most often not a description of a present state but of an envisaged afterward" [Berkman 2020: 101]. Similarly, Latvian exile literature was studied already in the post-exile period with a view towards the past.

On 4 May 1990, the Latvian Soviet Socialist Republic (LSSR) Supreme Council passed the declaration *On Restoring the Independence of the Republic of Latvia*. On 6 September 1991, the new ruling council of the USSR recognized the independence

of the three Baltic republics – Estonia, Latvia, Lithuania [Plakans 2007: 259]. Literary researchers can focus on researching exile literature in Latvia after censorship. The concept of exile literature becomes problematic, where Latvian exiles do not form geographical borders or communities of time. "It is impossible to create a concept that would characterize exile literature. Everything called exile literature is nothing more than the number of works by writers who are no longer allowed or do not want to be published in their homeland." [Gūtmane 1992: 84]. Literary scholar Inguna Daukste-Silasproģe, marking the Latvian post-exile phenomenon as the next stage of research, concludes "that the concept of post-exile is still searching for its research streams, and each national literature, with this exile component, can expand the understanding (boundaries) of what to include in it and what the most important accents should be" [Daukste-Silasroģe 2024: 118].

What happens to exiled writers wanting to publish after Latvia regains independence? What new topics did exiled authors explore? Did they find new readers in post-Soviet society? In 1989, literary scholar Valters Nollendorfs pointed out to Soviet Latvian writers in Swedeen about the ability of the exiled society to write – "they would write differently" [Čaklais 1989: 4].

The article will examine notion of return narrative in Latvian Australian Aina Vāvere (1924–2011) novel *Maybe It Was* (1992) and American Latvian Jānis Klīdzējs (1914–2000) *Craving for Sunrise* (1995). Vāvere's first publications were during a refugee period in Germany, 1956; she emigrated and lived in Australia. Klīdzējs made his debut in Latvia, 1931; emigrated from Germany refugee camp to USA and lived on the West Coast.

In 1993, Vāvere writes letter to head publishing house *Preses nams* Māra Caune (1941–2010) about the difficulties of getting published: "I cannot and do not want to pay for publishing (we have already discussed the principles and reasons). I am willing to donate the writer's fee back to the publishers (...). In this way, I hope to support Latvian publishers" [Vāvere 1993]. In another letter, poet Andrejs Eglītis (1912–2006) writes about Latvian society to Klīdzējs: "The spirit of the mafia reigns in the writers' union. The Soviet man still lives in souls" [Eglītis 2005: 212]. If one letter indicates the economic difficulties in publishing works, then other emphasizes on difference in society between exiles and post-soviet Latvians.

Estonian cultural and literary researcher Epp Annus emphasizes that the Baltic states have experienced profound and systematic violence, the collective trauma of which was preserved in the memory of Soviet deportations after the restoration of independence. As an example, Annus cites the personal memories of Estonian writer Mari Saat (1947), where suitcases were rearranged, and clothes of outgrown children were replaced with new ones: "Calculation for possible deportation persisted

in the scar tissue of people's imaginations as late as 1996, five years after the collapse of the Soviet Union and the withdrawal of the Russian occupation" [Annus 2019: 37].

Under these circumstances and the opportunities for both groups to meet in Latvia's geography, it is problematic for post-exiled Latvians and post-soviet Latvians with their different historical heritage and memories. Many writers have continued to publish works outside Latvia and remain in exile subjectivity, because the rejection and trauma were too strong.

After the restoration of Latvia independence, when the exiled community returned, post-soviet Latvians started *othering* post-exile Latvians. As Gayatri Spivak points out, to regain lost self-respect, *othering* takes place in postcolonial societies; it is necessary to strengthen one's identity and the branding of *others*. Whatever the markers that mark the line between *us* and *them* – race, geography, ethnicity, economy, or ideology – there is a danger that they become the basis for self-affirmation, which depends on the denigration of the other group. "Same-and-othering, the groups that receive some attention in the cultural sphere are the new immigrants (sometimes unjustifiably conflated with exiles, refugees, diasporic, and postcolonial in the former colonies)" [Spivak 1995: 269]. *Othering* takes place on both sides – from the post-exiles and post-soviet Latvians. *Others do* not always have a negative connotation. The series of novels about history *The 20th Century*, writer Arno Jundze's (1965) novel *Red Mercury* (2017) includes an imaginary conversation between sisters – Dzidra stayed in Soviet Latvia, and Mirdza lives in Canada – the exiled Latvian admits that she does not always understand the customs of Soviet Latvia.

Klīdzējs' novel *Craving for Sunrise* was published in fragments in the newspaper *Laiks* (1990–1991), and literature researcher Ilona Salcēviča prepared the text in book format. In the afterword to the novel, she points out many historical inaccuracies, including "quite a few pages that indicate a poor knowledge of local conditions. The description of universities and some other institutions is inaccurate, but it has been left unchanged because this is not a documentary work".

Despite the historical inaccuracies of the novel's narrative and the incorrect depiction of Soviet Latvia, Klīdzējs immediately became a prominent figure after Latvia regained its independence. He was well known by his previous written novels. This increased attention is associated with release of film *The Child of Man* (1991) by Jānis Streičs. This film has not lost its popularity still nowadays. It is based on Klīdzējs' childhood memories in novel *The Child of Man* (1956). Klīdzējs becomes a symbol of the rise of self-confidence among the Latgalian-Catholic people. Similarly, Gūtmane writes about the legacy of poet Veronika Strēlerte's personality and poetry in the early 1990s: "She understood very well how this attention around her personality will pass away, that it is currently more related to the fact that she is

still alive, and not because of her works. Strēlerte was very aware that exile literature is hardly needed. She is just a symbol". The symbol of Klīdzējs' personality was created through the film, as a religious practice or ritual made him a social phenomenon of *popular worship* [Sundahl 2022: 437].

Vāvere receives similar attention, her cult of personality was portrayed as a representative of the Baltic German Vērmaņi family. Her ancestors donated the Vērmanes Garden to Riga. Vāvere participated in the opening of the Anna Vērmane monument in 2000, and she was described in newspaper, as the guest of honour of the event and a descendant of the Vērmaņi family in the fifth generation. Also, increased attention was attracted by the fact that the prestigious publishing house *Penguin Books* published Vāveres short stories, *The Blue Mountain in Mujani* (1990). The novel *Maybe It Was* (1992), published in Latvia, is a modified and expanded version of this collection of stories. The artistic design of the Latvian publishing house for the novel *Maybe It Was* is alike the *Penguin Books*. This also indicates the new ambitions of the Latvian publishing house to emulate the model of Western publishing (Figure 1).

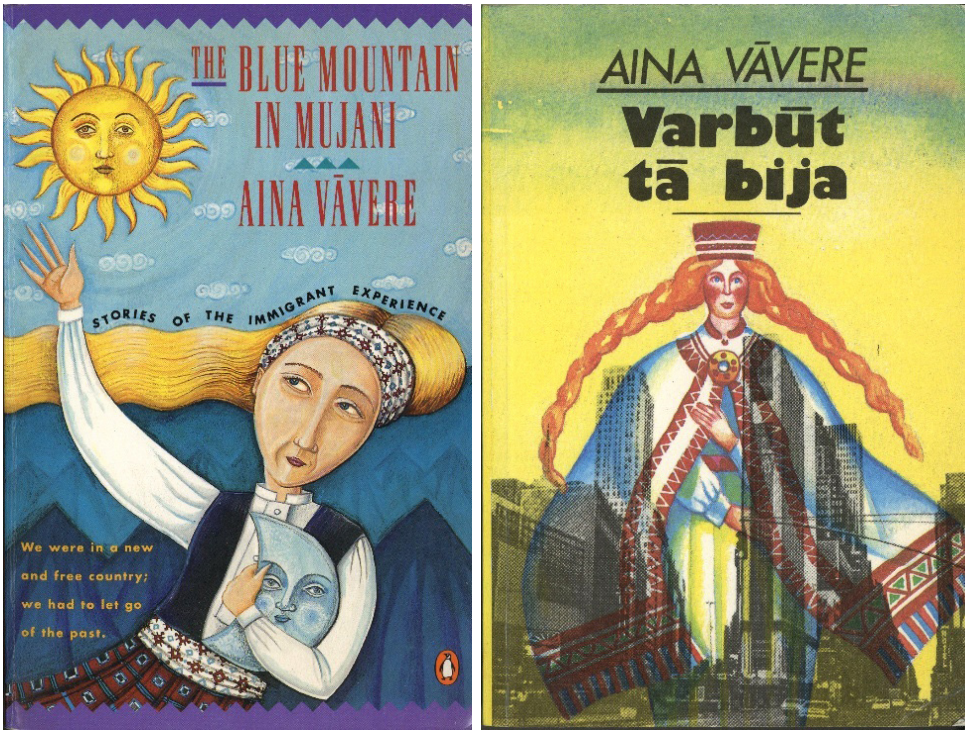

Figure 1. *The Blue Mountain in Mujani*, 1990; *Maybe It Was*, 1992.

Klīdzējs' and Vāvere's novels are similar in narrative structure, which was determined by adaptation to the new Latvian reader. It can be divided into three parts: history of exile, first impressions in Latvia during the Third Awakening, and choices of return. Klīdzējs' characters from America get familiar with Latvian society, which has existed in *systemic violence,* as Slavoj Žižek continuously, "is thus something like the notorious dark matter of physics" [Žižek 2009: 2]. Freedom of speech is suppressed in various ways, and society lives in hidden fear.

If the characters offered by Klīdzējs encourage them to act spontaneously and bravely, then Vāvere's offer is focused on the future potential of cultural interaction. The sibling characters created by Vāvere enter the intercultural territory, where each Latvian individual appears as a separate and individual personality in a unique situation and does not lose his belonging to the overall picture. Vāvere crosses the boundaries of the *other* existence without trying to deny or make them less important, thus not falling into binary opposition of colonizer/colonized, allowing for new, hybrid expressions and meanings. Also making cultural elements to create new hybrid expressions, because both – post-exiles and post-soviet society contains the same language. Both novels feature characters with hybridity [Bhabha 1994]. The main characters of both novels are a generation with no direct memories of Latvia before their refugee journeys. Therefore, the interpretation of hybridity helps to understand the possibility of post-exile return from a postcolonial perspective.

Aina Vāvere: Which way is the return?

The novel *Maybe It Was* (1992) by Vāvere is a reworking of texts from the short story collection *Foreigner Album* (1989) published in Latvian and the short story collection *The Blue Mountain in Mujani: Stories of the Immigrant Experience* (1990) published in English. *Maybe It Was* represents an empathetic and unusual work of Latvian hybridity in post-exile literature. In it, the author talks about the existence of Australian Latvian belonging, sexuality, and mutually different identities unusual in Latvia at the beginning of the Third Awakening. The Latvian identity of the main character, Edme, is closely intertwined with Australia's colonial history, nature, and mythology. Vāvere introduces the view that the identity of a Latvian in post-exile can consist of such two mutual nationalities.

Edme arrives in Soviet Latvia and meets a distant relative, to whom she develops a romantic attachment. She considers living together and a future with someone who indirectly connects to the former colonizer's discourse, an attempt to find an empathetic contact zone. She recognizes the meeting, coexistence, and mutual enrichment of different ethnic groups as valuable without denying the reality of historical events. The main action takes place in the city. In some episodes, the character remembers the Australian desert in connection with Aboriginal mythology.

Five characters are created in the part of the novel depicting Soviet Latvia. Edme and Edmunds, a brother and sister from Australia, visit Soviet Latvia for the first time. They are driven to get to know their father's relatives, improve their Latvian language, and experience spiritual excitement. It is important for Edmunds that his father's relatives are associated with idealized heroic stories of resistance. He gets to know local Latvians to help in the efforts to restore independence. Edme experiences an intense identity crisis. She realizes it is impossible to return to a place she has not been to before. Jānis Kalve, a distant relative, was born in Kotlas, in northern European Russia, where he works in a paper fabric. Because of his appearance, he experiences a dismissive attitude towards Latvians. Anna is dreamy, a young Latvian American with rainbow-colored hair, who meets and happily gets engaged to Edmunds in a hotel. Mētra's aunt is a relative living outside the capital, she works as an accountant.

Each of these characters plays out an attitude scenario with identity. These experiences affect the perception of identity in general; Vāvere shows that the emphasis on Latvianness for the place of birth is less important than the attitude to create and construct identity. By emphasizing that identity is cultivated in a specific geographical place, it is not automatically guaranteed. Vāvere models various types of belonging and identity concerning the character. Jānis and Edme's conversation about belonging takes place in a smithy, where symbolically, one can transform into a new quality with willpower and hard work. Jānis rejects Edme's call for closer relationships. Jānis expresses ambivalent thoughts, feeling *non-belonging* as an oppressive burden and at the same time as his identity.

Edmunds and Anna's joyful relationship flourishes in the hotel. It is a liminal space between their birthplace and their visiting the Latvian SSR, and like their two identities, they can move freely between these two spaces without choosing one. The five characters visit the Dome Church on the last evening, where the cantata *God, Your Land is Burning!* by pianist and composer Lūcija Garūta and poet Andrejs Eglītis is played. It is a prayer of the Latvians, a powerful sign of a tragic era, first performed in Riga on 15 March 1944, during the Second World War. Edme reinterprets the cantata, focusing not on the challenges Latvians have faced throughout history, but rather on the significance of climate catastrophe, she reflects on the eucalyptus forest fires in Australia.

Characters from the distant shore

Along with Vāvere's novel, the motifs of return can be found in the prose voice of Klīdzējs' novel *Craving for Sunrise* (1995). It is dedicated to adventures in the cultural space of the Latvia SSR, which depicts the emotional decline of Soviet Latvians and the loss of meaning in life. This work belongs to the final works of Klīdzējs' creative period in the 1990s when reprints of his novel *The Child of Man* (1953) with images

of the melodrama by director Jānis Streičs were published one after another. In 1948, in the writing of the refugee period [Daukste-Silasproģe 2001], the collection of stories *People on the Bridge* was published, the content of which is harshly criticized by literary critic Jānis Rudzītis: "The division of the characters into black-and-white principle, which destroys the will and need to delve into the subject objectively". In the continuation of the criticism, Klīdzējs receives praise for the characters of the people of the native side – Latgale: "he is a typical person from this part, and he should remember this every time another topic tempts him" [Rudzītis 1948: 4]. These two principles also appear in the novel *Craving for Sunrise*.

Klīdzējs' three characters (godfather Jēkabs, and best friends – Keizijs and Pēteris) reflect the idea, rooted in the collective consciousness of the Latvian exiles, that it was necessary to resist attack of the USSR. Klīdzējs opposes the Latvian resistance tactics of that time, with fight of Finns during Winter War (1939–1940), when the Finns showed bravery and did not allow occupation of Finland by the USSR. This idea of resistance becomes part of adventure narrative by Klīdzējs, which do not form together with an accurate interpretation of the history of the Latvian SSR in 1984. On the one hand, Klīdzējs could not been aware of the social and economic conditions of Soviet Latvia, or on the other hand, guided by aesthetic motives, where he chooses to exaggerate the gloomy environment. The portrayal has moved towards the genre of a dystopian novel for these two reasons.

Klīdzējs' three characters experience urban and countryside environment, where they reflect on poverty, gloomy and sad faces of the people and look for a way to help. The depiction of the market highlights the townspeople's lack of money. The main characters, Keizijs and Pēteris, buy food for a poor woman and pay the taxi driver with dollars to take woman home with heavy shopping bags. Klīdzējs uses the exaggerated generosity of dollars to indicate the economic poverty of the Latvian SSR comparing with rest of the world. At the market gate, Keizijs is approached by long-haired currency speculators, who buy foreign currency from tourists. In this depiction, Klīdzējs portrays the currency speculators as greedy self-interest seekers who think about their individual, not the common good of Latvian society.

A teenage boy asks Keizijs to give him American dollars so he can show them to his school friends. Keizijs gives him the money and wants to give him a Latvian flag pin. The boy's mother does not allow him to take the patriotic symbol. The reason is that the boy could be expelled for such a gift. The narrator points not only to the controlling mechanism of the power structure, but also the fears of the middle generation and living with oppressive circumstances.

Since tourists are forbidden from leaving Riga, so the characters secretly exit the city. Keizijs concludes that you can talk freely and openly with your friends when you get away from the city. Keizijs meets his grandmother on the periphery

of the countryside for the first time. She symbolizes memories of Latvia before World War II. Keizijs has brought various gifts – perfume, winter boots, and sewing accessories. It is exaggeratedly emphasized that buying such an everyday thing, as a needle, is impossible.

In the countryside, the characters meet a poorly dressed priest, for whom they want to buy a suit trousers and shoes. The Soviet government imposed strict restriction of the church's activities, viewing it as a potent vehicle for an ideology opposed to communist ideology. The KGB recruited clergy and priests to cooperate, with various compromising materials, promising various benefits or the opportunity to travel abroad [Krūmiņa-Koņkova 2017]. Often, clergy agreed to cooperate to keep the congregation together.

The characters notice that the store shelves are empty, but when they show them dollars, the saleswoman locks the door and finds all the necessary goods. The narrator describes the conditions of lack of goods, where not all goods are available to everyone, but can be obtained through *blats*. Term *blats* mean a personal and illegal trade of material benefits within the Soviet planned economy.

After the heroes return to Riga, Keizijs is caught and taken to the KGB. He meets with Comrade General Boriss Karlovičs. (The prototype of this character is Boris Pugo (1937–1991), the chairman of the State Security Committee of the Latvian SSR from 1980 to 1984). The peculiar interrogation turns into a conversation about national identity. Keizijs says that he was born in German occupied Latvia in October 1944 and was adopted by an American couple. Keizijs has recently mastered the Latvian language and culture, which has become part of his personality. Klīdzējs points out that American identity can harmoniously consist with Latvian part. Such a combination embodies the democratic self-confidence of the West and the spiritual connection with Latvia.

At the end of the novel, Keizijs becomes an equal part of the local landscape in the ritual of kneading bread dough in his grandmother's house. Food can signify the revival of family connections in different ways. When Keizijs kneads bread dough, it symbolizes a shift from frivolously spending money to engaging in meaningful, physical labour. For Latvians, kneading bread dough represents a change in status [Friks 2023]. Since the heroes have helped many residents with money, gifts, and moral support, everyone can sit at a common table, which symbolizes the horizon from which one can await the Sunrise – the independence of Latvia.

Conclusions

The novels by Klīdzējs and Vāvere expressed the essence of the early Third Awakening period in Soviet Latvia. *Craving for Sunrise* emphasizes economic conditions and outside world; *Maybe It Was* concentrates on the emotional inner

world. Both novels address the crucial issue of Latvian exile identity for a generation not born in Latvia. Klīdzējs encourages searching for relatives, recovering, and restoring property, while Vāvere points to creating new meanings. Her character hearing the cantata *God, Your Land is Burning!* imagines climate change as the next catastrophe, more dangerous than war.

The exile writers' portrayal of Soviet Latvia is associated with poverty and the emotional decline of people. At the same time, this view is formed by comparing people arriving from the Western world. The Western view prevents one from delving into other levels of society, to which the authors do not have access. In both novels, the image of Soviet Latvia is formed from the outside before the characters arrive.

The postcolonial experience of Latvian exile marks the inability to return to the original state, but a new transformative beginning must be sought. Soviet Latvia is a foreign, unfamiliar place for the characters of both novels; their desires to help are idealized and guided by the world of Western European human rights and democratic values. At the same time, there will be a lack of in-depth depiction of the everyday life of Soviet Latvian society and the fate of people. Post-Soviet writers who wrote about this time in the early nineties used other emphases and did not highlight the poverty discourse as Latvian post-exile writers emphasize.

These authors understand that 45 years have passed since the occupation of Latvia, and a new generation has grown up who will seek a connection with Latvia; therefore, in order not to lose this generation, the first generation depicts a narrative of return to connect the next generation with the potential opportunity to *return*. Considering the postcolonial Latvian society, a hybrid identity model emerges, where different experiences of living space can be found in mutual interaction. Postcolonial Latvian society is also not monolithic and retains its differences. However, this does not mean that there is one option that determines some more accurately than others; rather, it is necessary to understand the more diverse experiences of Latvianness and not try to equalize, but to highlight the differences.

Acknowledgments

The publication is financed by the Recovery and Resilience Facility project *Internal and External Consolidation of the University of Latvia* (No. 5.2.1.1.i.0/2/24/I/CFLA/007).

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MEMORY STUDIES AND MNEMOHISTORY

AUTOFICTION AS A MEDIUM OF MNEMOHISTORY IN THE CONTEXT OF PARADIGM TRANSFORMATIONS

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Abstract

One of the most significant genres in Western contemporary literature is autofiction. Its orientation towards remembering the individual past and history has provoked reflections on a transformation of cultural paradigm and linked to the development of mnemohistory and the concept of literature as the shapers of cultural memory.

This paper examines the autofiction genre as the mnemohistorical medium through which individual memories are expressed. Using the insights of individual postmodernist and metamodernist theorists as sources, we can see the changes in autofiction over the past decades.

Since the first decade of the 21st century, in Latvian prose, we can see various elements of autofiction and differentiate some groups of texts. A vivid contemporary autofiction is Svens Kuzmins' novel *Brīvībene* (Orbīta, 2024). The article aims to characterise Kuzmins' autofiction in the context of postmodernism and metamodernism, highlighting reinterpreting historical events through personal lenses as an eventual example of paradigm transformation and the medium od mnemohistory. The study's results show oscillations between documentary facts and fiction, irony and sincerity, and the search for identity, historicity, and depth. These mark the existence of several elements of metamodernism and demonstrate that literature can be an active participant in the process of mnemohistory. Metamodernism and mnemohistory share a position of active engagement, focusing on reinterpreting the past to create meaningful frameworks for the present.

Keywords: *documentary facts, fiction, mnemohistory, postmodernism, metamodernism*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.554

ISSN 2500-9974

CULTURE CROSSROADS

Insight into the development of the contemporary autofiction genre

In the review of the second European Writers' Festival, held at the British Library in May 2024 and bringing together writers from across Europe to discuss how storytelling is changing, concluded that "writing about personal experience embedded in history remains central to European literature" [Topol 2024]. In contemporary literature, this recording of the self in history occurs by combining autobiographical motifs, documentary material, and imagination. Critics have called this kind of writing autofiction. The term was coined by the French writer and, critical theorist, professor of French literature at New York University Serge Doubrovsky, who wrote on the back cover of his novel *Fils* (1977) a few lines that stated the official birth of a new genre: "Fiction, of strictly real events and facts; autofiction if you like" [Doubrovsky 1977]. Since then, autofiction signifies a narrative form that undermines the generic borders between autobiography and fiction. Unlike autobiography, autofiction takes more liberties to play around with the chronology, affects, and accuracy of the story but still adheres to depicting real-life events. French narratologist Gérard Genette perceived autofiction as a fictional narrative helmed by a characterised version of the author that maintains a connection to extratextual truth. However, the author's self-image is often largely fictional; the author just like implies – "I, the author, am going to tell you a story of which I am the hero, but which never happened to me". [Genette 1993: 77–76]

It must be admitted that there is a lack of consensus among critics regarding the concept of autofiction. German literary theorist Martina Wagner-Egelhaaf, in her work *Handbook of Autobiography / Autofiction* (2019), has pointed: ""autofiction" is not a unified notion. Critics have struggled to define "autofiction" and various suggestions are under discussion. The fact that literary studies do not provide a consistent explanation of what "autofiction" in fact means may be considered as a sort of epistemological weakness and an argument to abstain from the category at all." [Wagner-Egelhaaf 2019: 3] Other researchers also describe opinions about autofiction as significantly diversified: "Indeed, although some critics look at autofiction as a massive phenomenon and consider it the literary genre of the twenty-first century, others simply deny it. In spite of this, autofiction has stimulated a prolific discussion about authorship, readership and literature in general." [Miceli 2024: 141] However, it cannot be said that the concept of autofiction has been ignored; in recent years, researchers have paid extensive attention to this issue from very different perspectives [Czyżak 2024; Heidenreich 2018; Jacobi, Ott & Schönwälder 2022; Grell 2014; Procházka 2024; Roche, Grell, & Burgelin 2010; Wagner-Egelhaaf 2019; Worthington 2018, etc.].

Autofictional writing is linked to the actualisation of individual and collective memory in literature, which has been booming for several decades. In the introduction to the collective monograph *Memory Frictions in Contemporary Literature* (2017), editors María Jesús Martínez-Alfaro and Silvia Pellicer-Ortín conclude that a memory boom has been observed in literature since the 1990s. This tendency "has made memory a central concern in contemporary culture and politics in all societies on a global scale" [Martínez-Alfaro, Pellicer-Ortín 2017: 1]. It has challenged the historicist mode that predominated until the 1980s. The reassessment of historicism's universality, totality, and objectivity has prompted a focus on memory, which helps highlight the fields of subjective and local experience and, through subjectivity, activates empathy for understanding historical events.

Since the late 1990s, the mixing of memory and history has been conceptualised as a new discipline or subfield of history – mnemohistory (in German *Gedächtnisgeschichte*), first introduced in the broader context of cultural memory studies by the German historian Jan Assmann in his 1997 book *Moses, the Egyptian the memory of Egypt in Western Monotheism*. Mnemohistory abandoned the positivist study of the past in favour of the study of the actuality of the past, not the factuality of the past: "Unlike history, mnemohistory is concerned not with the past as such, but only with the past as remembered." [Assmann 1997: 9] Thus, people's memories were valued and became an essential testimony of the past, reviving and embodying historical facts. Mnemohistory focuses on how separate groups construct, use, and reshape memory in different contexts.

When memory is embodied in cultural forms, we can speak about the formation of cultural memory that Assmann included in the studies field of memory [Assmann 2008: 109–118]. According to this conception, literature is one form of production of cultural memory. Researchers of cultural memory Astrid Erll and Anna Rigney have recognised that the "literature is a medium of remembrance" [Erll & Rigney 2006: 112], which contributes, along with other media, to shaping collective memory and determining how societies remember their past [Gūtmane 2024: 42]. Furthermore, with the spread of the culture of memory, the hierarchical view that history is the primary, whilst literature – the secondary source of knowledge about the past, is being abolished. Postmodernist theoretician Linda Hatcheon notes the relation between historical and literary sources: "there is no question of a hierarchy, implied or otherwise. They are both part of the signifying systems of our culture. They both make and make sense of our world." [Hutcheon 1989: 28]

Reconstruction of memory, the mixture of documentary or historical or autobiographical facts and fiction in the formation of the writer's self-image, and the writer's arrival in the position of the novel's hero are among the main trends at the end of the 20th-century and the beginning of the 21st century in contemporary

Latvian prose. Hence, it fits into this general flow of autofiction in Western literature. Depending on the works' primary focus, we can see some groups of autofiction elements in 21st-century Latvian literature.

The first group consists of prose texts with a conditional historical orientation, which primarily focuses on historical events that are connected to the creation time of the works and the author's reflections on the past and present. The most striking example of the novels in the series *Mēs, Latvija. XX gadsimts* (*We, Latvia. XX century*, 2014–208) is Pauls Bankovskis' novel *18* (2014); autofiction can be seen more directly in individual stories from the collection Andra Manfelde's *Mājās pārnāca basa* (2018). These works can be considered examples of *historical metafiction* because the author comments in the first person on the creation of the work, the past being examined, or the process of cognition. He does not hide his involvement and reflects on it. Theorist Linda Hutcheon introduced the term historical metafiction in her 1987 essay *Beginning to Theorize the Postmodern*. In her seminal study, *The Poetics of Postmodernism* (1988), Hutcheon has described novels that are "both intensely self-reflexive and yet paradoxically also lay claim to historical events and personages" [Hatcheon 1988: 5]. Such novels both question and affirm that knowledge of history reflects real history; they exhibit a fusion of self-reflection and historical truth.

Along with historical metafiction, among the historical novels inside and outside of the series, it is possible to highlight a work that could potentially be considered more of an autofiction – Nora Ikstena's novel *Mātes piens* (2015) because the author's involvement is not directly positioned here, the author does not use her name, and several facts from her biography have been changed, there could still be many autobiographical motifs depicting the experience.

The second group consists of prose of a conditional biographical orientation, which is dedicated to a historical or more recent past personality, at least – to outstanding classics of Latvian literature, but in which the author's self-reflexive presence and self-image are also felt, for example, Nora Ikstena's *Esamība ar Regīnu* (2007), *Vīrs zilajā lietusmētelītī* (2011). Several novels from the series *Es esmu ...* (*I am...,* since 2020) are worth mentioning here, especially – Andris Akmentiņš's novel *Meklējot Ezeriņu* (2021), Inga Gaile's novel *Rakstītāja* (2020). From recent literature, a vivid compilation of documentary and fiction is worth mentioning in Baņuta Rubesa's novel *Te bija Brunis* (2024), dedicated to her father and his experience in the Latvian Legion and the post-war years. However, the works of this group can also be considered more like biographical metafiction, in which the author takes on the role of a commentator and a reflector but does not convey the broader field of their personal biography and experience. This group also reveals a way to express one's attitude towards the object being described and one's own literary or social-political views.

The third group is the prose of a conditional autobiographical orientation, which includes the author's own field of experience and memories and elements of self-reflection at the time of writing. This group is comparable to historiographic metafiction, which addresses the constructed nature of historical accounts. In turn, "autofiction addresses the constructed and constantly changing nature of authorship: although an autofictional author may have an empirical existence outside an autofictional text, the primary image we as readers have of the author is presented through the text's narrative positioning" [Worthington 2018: 13].

Examples of autofiction in Latvian literature can be found already in the first precedents of postmodernism, for example, in the works of Regīna Ezera in the 1970s. However, in the 2000s, a greater spread of the autofiction genre has been observed. The most striking examples are novels by Jānis Joņevs *Jelgava 94* (2013), Rihards Bargais *Plikie rukši* (2017), *Nemodernās Slampes meitenes* (2021), and, in a way, also a novel by Anna Auziņa *Mājoklis. Terēzes dienasgrāmata* (2021). In this group, the authors most directly record themselves in history as they re-create their experiences and documentary evidence and create a documentary-fictional form of the time and space of their lives. Another example of autofiction is Juris Rozītis's novel *Displaced Person. Kāda latvieša stāja svešumā* (2024), the modernistic *Bildungsroman* – a novel about the growth of young man's growth in exile in Latvian society and his travels in Australia and Europe in the 1970s. Although the author distances himself from the text, does not use his name, and tells the story from the protagonist's point of view, this work can be considered autofiction. These are prose texts that the term autofiction can most directly characterise.

As can be seen from the aforementioned, the tendency to fuse fact and fiction and author involvement in text intensified after the first decade of the 21st century. This coincides with a period when Latvian prose experienced an increased interest in history, focusing on reconstructing individual experience and memory in literary text. Thus, Latvian literature entered the general circulation of the mnemohistorical process and caused controversy among literary scholars, writers, and historians, marking a turning point in the understanding of the role of the literary text in evaluating and preserving the past[1]. At this point, Latvian literature enters the public eye, becoming a way to reevaluate the perceptions of historical and recent past based on the synthesis of individual experience, memory, and documentary archive materials.

How does this relate to broader cultural paradigm shifts? By examining the development of the autofiction genre from the perspectives of postmodernism

[1] See: Žurnāls "Domuzīme" (2018). Izrāvumi no tumsas. Diskusija par romānu ciklu "Mēs. Latvija, XX gadsimts". *Delfi Kultūra*, 10. 10. Available: https://www.delfi.lv/kultura/news/books/izravumino-tumsas-diskusija-par-romanu-ciklu-mes-latvija-xx-gadsimts.d?id=50449031

and metamodernism, it is possible to draw certain conclusions about the most current trends in attitudes towards the past, memory, history, and their connection to the present.

Autofiction between fact and fiction: the point of view of modernist and postmodernist literary paradigms

Although elements of autofiction are almost as old as the entire history of writing, the author's deliberate play, mixing fact and fiction, can be traced back to the Romantic era and the resulting modernist literature. In Knut Hamsun's novel *Sult* (1890), Marcel Proust's *À la recherche du temps perdu* (1913–1927), Virginia Woolf's *Mrs. Dalloway* (1925), James Joyce's *Ulysses* (1922), Rainer Maria Rilke's *Die Aufzeichnungen des Malte Laurids Brigge* (1910) or even in almost all of Kafka's works, the writer themselves is more or less embodied in one of the characters or some situations. In modernist prose, the writer is both himself and not himself; he simultaneously reveals and hides himself, but his intentions are serious. They intensively try to bring back the past, turning to memories, but often also using documentary materials (especially Joyce). The documentary facts serve modernists as a way of revealing subjectivity. Through the prism of subjectivity, modernists seek to uncover the complexity and fragmentation of the individual's inner world. This inner world becomes the main object of study, and external space is illuminated through complex techniques – narrative changes, inner monologues, streams of consciousness, or parables.

In turn, this intense positioning of the self in the text and its interpretation from a critical perspective led to Roland Barthes' postulated idea of the author's death in the 1960s. However, with the development of postmodernism, the author again wants to return to the text but does it playfully and defiantly. Wagner-Egelhaaf has acknowledged that postmodern writers' play with the synthesis of autobiography, documentary, and imagination is a natural reaction to Barthes's proclamation of the author's death, and this is "a symbol of the author's presence and persistence" [Wagner-Egelhaaf 2019: 1].

Until the mid-20th century, the positioning of the writer in literary fiction was quite clearly distinguished from autobiographical writing (non-fiction), but with the development of postmodernism, their boundaries became blurred. This blurring of boundaries is also related to the fact that postmodernism, in reference to Hutcheon's observation, is self-consciously art within the archive, and that archive is both historical and literary [Hutcheon 1989: 6]. Wegner-Egelhaaf also tried to explain the reasons for this liminality and called for distancing from the naive notion that an autobiography may be "true" or "truthful", that critics rejected as early as the 1960s: "Critics have argued that nobody can ever thoroughly report his or her

life since, on the one side, human memory is deficient, and, on the other side, human beings are narcissistic, which means they are not at all neutral and objective when it comes to looking at themselves – and others. As early as in the 1960s, literary scholars have highlighted the fictional dimension inherent in every autobiography." [Wagner-Egelhaaf 2019: 1]

However, contemporary autofiction has an essential difference from autobiography. In one case, the primary aim is to create an artistic work, develop an idea, and attain a level of artistic generalisation, whereas, in the other, the primary objective is to reconstruct or construct a life story. Each of these cases involves building a different relationship with the reader. The French philosopher Philippe Lejeune developed his well-known theory of *the autobiographical pact* showed how this pact differs from *the fictional pact* [Lejeune 1989, 13–15]. Autofiction can be considered a specific strategy of self-expression in which authentic experiences take on textual form, in contrast to the rules of establishing an autobiographical pact. The measures taken within it do not unify the self-image nor create the possibility of reconstructing the linear course of biography and its cause-effect sequences [Czyżak 2020: 94]. Autofiction oscillates between the autobiographical and the novelistic pact. French narratologist Gerard Genette called it "intentional contradictory pact" [Genette 1993: 76]; American researcher Marjorie Worthington metaphorically described it as *no-man's-land* [Worthington 2018: 13].

Lejeune once allowed it is theoretically possible to find a work based on a fictional pact in which the author, narrator, and character all have the same name but denied its real possibility: "the coexistence of the identity of the names and fictional pact, and that of the difference of name and the autobiographical pact being excluded by definition" [Lejeune 1989: 15]. However, these oscillations between the autobiographical and fictional pact have been possible since the turn of the century. This means that unsure of how to read the text, as an autobiography or as a novel, the reader oscillates between two attitudes of reception. Autofiction "no longer revolves around a pact (...) between writer and reader about the truthfulness or inventedness of a literary text, but refers more generally to the symbolic function of language, the process of putting experience into words, and results in the typical blending of strictly referential facts" [Gronemann 2019: 242].

Being in the in-between space is associated with the advent of the post-truth era in postmodernism, when "facts, the truth, and reality are increasingly undermined, while fiction is given a status upgrade" [Wynants 2020: 10]. As fiction's role grows, writers' *linguistic self-consciousness* also increases [Worthington 2018: 13–14].

It seems paradoxical that literature offers more and more reality in this age of blurred reality and truth. The author's expression of individual experience and opinion sounds like a backlash to the rapid development of media and digital

technologies but also due to globalisation, which threatens the loss of human uniqueness: "The insistent diversity of autobiographical and autofictional production all over the world is an obvious and weighty counterpoise to these ongoing processes of homogenization which calls for thorough scholarly research." [Wagner-Egelhaaf 2019: 4]

However, authors of autofictions also tend to distance themselves from the sole expression of truth, and this attitude can be viewed in the context of contemporary postmodern transformations.

Possibilities of contemporary interpretation of autofiction: Svens Kuzmins' novel *Brīvībene*

From the previous part of the article, it can be concluded that the mixture of documentary and fiction in autofiction became particularly relevant in the era of postmodernism. The self-reflexive blending of fact and fiction is associated with self-consciousness, deconstruction of grand narratives, revaluation of values, irony, pluralism, demolition of boundaries, challenge, and playfulness, which are characteristics of postmodernist literature. Still, since the end of the 20th century, a change in literary mood has also been felt. However, as early as 2002, postmodernist theorist Hutcheon herself declared in the second edition of her work *The Politics of Postmodernism* (2002) that postmodernism was over: "postmodern may well be a twentieth-century phenomenon, that is, a thing of the past." [Hutcheon 2002: 164] Increasingly observing the discrepancy between literary practice and the nihilistic and ironic position attributed to postmodernism, theorists began searching for a new evaluation perspective.

In the second decade of the 21st century, the belief has already been strengthened that after the era described as lack of historicity, meaninglessness, and depth formulated by Jameson in his book *Postmodernism, or the Cultural Logic of Late Capitalism* (1989), an era of historicity, emotional impact, and depth is emerging [van den Akker, Gibbons & Vermeulen 2017], which can be productively viewed from the perspective of metamodernism.[2] In literature, two distinct theories of metamodernism emerged in the second decade of the 21st century. For David James and Urmila Seshagiri, metamodernism is a lens "to reassess and remobilize narratives of modernism" [James, Seshagiri 2014: 89], to discover modernist stylistic features

[2] Vermeulen and van den Akker's first article in an open-access journal dedicated to the new perspective, *Notes on Metamodernism* (2010) [Vermeulen & van den Akker 2010], called for further debate on the manifestations of after-postmodernism. Vermeulen and van der Akker's edited collection of articles, *Metamodernism: Historicity, Affect, and Depth after Postmodernism*, outlines the history and main research directions of the new perspective [van den Akker, Gibbons & Vermeulen 2017].

and themes in recent literature, namely, the existence of modernism practices today. Metamodernist theorists Robin van den Akker and Timotheus Vermeulen begin their own theory with a conceptual clarity: "We will first discuss the debate about the alleged demise of the postmodern and the apparent rise of another modernism. We will argue that this modernism is characterized by the oscillation between a typically modern commitment and a markedly postmodern detachment. We will call this structure of feeling metamodernism." [Vermeulen, van den Akker 2010: 2] For these researchers metamodernism manifests "in literary works (and cultural and aesthetic forms more generally) through a mix of or oscillation between pre-modernist, modernist, and postmodernist tropes and devices" [van den Akker, Gibbons & Vermeulen 2019: 48] and a unifying similar sense of the world. In this perspective, alongside the various manifestations in contemporary literature, the coexistence of other literary and cultural movements characterising the capitalist system is also seen. Thus, their thoughts relate to the vision of postmodernist theorist Jameson that "postmodernism is not the cultural dominant of a wholly new social order (the rumor about which, under the name of "postindustrial society," ran through the media a few years ago), but only the reflex and the concomitant of yet another systemic modification of capitalism itself. No wonder, then, that shreds of its older avatars - of realism, even, fully as much as of modernism — live on, to be rewrapped in the luxurious trappings of their putative successor." [Jameson 1989: xi] Since the concept of metamodernism is a relatively new theoretical framework, it is still being debated and refined. The concept is not entirely accepted because of observable coexistence with other terms describing the cultural condition after postmodernism. Discussions continue about whether metamodernism is a separate paradigm, how it is related to digimodernism, etc. Without claiming to clarify the truth, this article will continue to use the criteria of the new theory in the analysis of autofiction and the study of a specific case.

Given that the paradigmatic processes in Western and post-Soviet literature (which we can still call Latvian literature) are different, parallels are nevertheless possible. In the following, Svens Kuzmins' novel *Brīvībene*, a vivid example of autofiction in Latvian literature, will be examined as an example of metamodernism, inviting consideration of contextual analysis of similar examples.

First, postmodernist theorists Vermeulen and Aker consider autofiction a dominant genre in the metamodern era. By autofiction, they understand the use of specific stylistic strategies – the combination of "autobiographical and memoiristic writing with fiction proper and the presence of the author figure as an autobiographical/autofictional subject within the novel" [van den Akker, Gibbons, Vermeulen 2019: 48–49]. In their opinion, the stylistic strategies of modern autofiction are the same as those in postmodernist novels; however, their use creates

significant deviations from postmodern logic [van den Akker, Gibbons, Vermeulen 2019: 49]. The author's appearance in 21st-century literature is the opposite of the ironic game of postmodernist literature, "where the author characters serve a flattening function, foregrounding the constructed textual surface of the fiction. The appearance of author characters in twenty-first-century literature is performative (while foregrounding the real author as the creator of the work) as it applies depth and depthiness and invokes affect and affectedness by foregrounding a contemporary world that the real author and readers share." [van den Akker, Gibbons, Vermeulen 2019: 51]

Brīvībene is a typical autofiction. The novel's motto states: "Everything described in this book has an illustrative meaning. Any similarity to real people and events is accidental." [Kuzmins 2024: 5] Therefore, the readers accept the fictional pact in their attitude towards the text from the beginning and read it as a novel. However, the novel is written in the first person, without hiding the "I" connection with the author, using his real name and surname, his mother's, and the artist Helēna Svilāne-Kuzmina's name, including direct biographical references. Consequently, the readers are subjected to doubt and, when evaluating the possibilities of an autobiographical pact, allow this work to be read as at least a conditional autobiography. Readers are also invited to perceive as real persons the two grandfathers – Bernards Vanags and Arnolds Barkāns, as well as other mentioned persons and places (or at least believe that they are based on real-life prototypes and places). Without a doubt, the message of *Brīvībene* cannot be perceived only on a documentary or fictionally level. The author denies this possibility already at the beginning of the work, creating the feeling that, in this case, we have reached *no man's land* where fact can also be fiction and *vice versa*, to paraphrase the title of a collective publication *When Fact Is Fiction: Documentary Art in the Post-Truth Era* [Wynants 2020]. At the beginning of the novel, the author notes the frequent interchange of fact and fiction, thus referring to the statement contained in this book – "the so-called truth value is hardly a valid criterion for distinguishing fact from fiction" [Wynants 2020: 11]:

"Sometimes, it is like this: a stupid, absurd, shocking or otherwise remarkable situation comes to mind, anyway – whether it is possible or not, you describe it to the best of your ability and publish it, but others read it and say – exactly! (...) And vice versa: you describe a life situation as naturally and in detail as possible, that is, without lying even a millimetre (...), but everyone says – it does not tend to be like that! And so on, once, twice, until soon, you no longer fully trust what is happening to you." [Kuzmins 2024: 19][3]

[3] Here and henceforth, translation of Kuzmins' text – Z. G.

However, this oscillation between the fact and the fiction is not postmodernist ironically charged, self-sufficiently played out and nihilistic. It is more of an *irony with* than an *irony about* – a shared smile of the possibilities of believability. The swing between fiction and non-fiction, a flickering between them, paradoxically offers a clear view of reality, confirming its different development options, and creates a premonition of how it most certainly could have been. Furthermore, "something may well be both fact and fiction at the same time", as acknowledged in the collective monograph *When Fact Is Fiction* [Wynants 2020: 12], so often fiction can reveal the essence of reality more clearly than fact. Therefore, it becomes clear that the most significant importance is not in documentary representation but elsewhere. As Marjorie Worthington admitted, "the meaning and power of an autofictional text resides more in its plot and themes than in the biographical or historical accuracy of the story it tells" [Worthington 2018: 3].

Flickering between fact and fiction, seeing reality in fiction creates a *depthiness* un *depthing* perspective typical of metamodern autofiction [van den Akker, Gibbons, Vermeulen 2019: 49–50]. In a reflection on his artistic quest, Kuzmins' hero realises that what he was looking for: "it was probably depth. We always went where reality seemed broader, deeper, and more complex." [Kuzmins 2024: 200]

To open the perspective of this *depthiness*, one must look down carefully. This desire to look into depths is associated with the conflation of the present and the past and the interest in history characteristic of metamodernist literature, contrasting the postmodernist belief at *the end of history*. The theoreticians conclude that the postmodern subject has ultimately lost the ability to orient itself and describe the relationships between past, present, and future, but the metamodern subject "the metamodern subject attempts to reforge the coherence between past, present, and future" [van den Akker, Gibbons, Vermeulen 2019: 52] and refuses "to accept the current state of the world, asking readers instead to think critically and defiantly about the ways in which world events are connected and how their own involvement figures in such a world" [Gibbons 2015: 41].

Brīvībene offers a strong position of involvement in the events of the ancient and recent past. No matter how often the hero leaves his grandfather's house on *Brīvības iela* (*Freedom Street*) in Riga, he always returns, each time understanding the events of the past and the nature of their intertwining more deeply and comprehensively.

The historical field touched upon in the novel encompasses the experiences of grandparents, parents and Sven himself, connecting them in a single connection and in a new, courageous way, abandoning the position of victim in the whirlwind of history and introducing the so uncomfortable idea of co-responsibility, which has so far only been heard episodically in Latvian prose evaluating history. The field of experience of the novel's protagonist is the time of Kuzmins' youth –

the turn of the millennium, which has so far been a period that has been little explored in Latvian prose. Moreover, it is a time associated with the formation of metamodernism. Authors of the article *Metamodernism: Period, Structure of Feeling, and Cultural Logic – A Case Study of Contemporary Autofiction* states that the transition from postmodernism to metamodernism approximately lasted from 1999 to 2011 [van den Akker, Gibbons, Vermeulen 2019: 43]. The beginning of the 2000s in the development of metamodernism can be compared to the transition to postmodernism in the 1960s. The start of the century is a period when it is increasingly evident that history is not impossible. The return of history, which can be associated with ecological, economic or (geo)political crises, is called the *bend of history* [Arquilla 2011], with this metaphor revealing a repeated engagement with history, an awareness of the unguaranteedness of progress and at the same time – an active involvement in its approximation, a position of hopeful realism or informed naivety.

In Kuzmins' novel, the affirmation of history sounds especially strong. Although the hero feels that all his memories of his ancestors are just a copy of a copy, he thinks that perhaps getting to know oneself should not begin with the knowledge of one's core, as has been considered so far. However, perhaps first, "one should get to know one's space, its history and mood, the background of events and the changing environment" [Kuzmins 2024, 138]. Regarding the rehabilitation of history, the novel's choice of the turn of the millennium seems quite conceptual.

Reading of Kuzmins' autofictional novel in the context of the interrelationship between postmodernism and metamodernism invites us to examine other works of similar orientation, asking the question – perhaps the past two decades have also seen signs of paradigm transformation in Latvian literature. Possibly other typologically similar texts can also be viewed in the context of the bend of history, the change of perspectives of surface and depth, the author's involvement and responsibility, faith and disbelief, irony and sincerity, truth and imagination.

The recording of oneself and one's memories in history in Latvian prose continues with a more self-conscious authorial stance, facilitated mainly by the overall process of cultural mnemohistory.

Conclusions

1. In contemporary Latvian literature, similar to trends in Western literature, there is a noticeable inclination to reconstruct individual memories and writing oneself within history. This phenomenon can be seen in various texts that explore past events through the author's perspective, particularly in metahistorical, metabiographical, and autofictional prose. This tendency aligns with the development of postmodernism, the emergence of a culture of

memory, and the introduction of mnemohistory and cultural memory theories in Latvia.

2. Although the spread of the autofiction genre began in modernism, its culmination in the Western world has been observed since the 1990s. Examples of autofiction in Latvian literature can be found already in the first precedents of postmodernism, for example, in the works of Regīna Ezera in the 1970s. However, in the 2000s, a greater spread of the autofiction genre has been observed. This increase indicates "cultural performance" of authorship, (...) a conscious enactment of the production of an authorial instance [Miceli 2024: 147].
3. To assess the performance of the autofiction genre, it is essential to reevaluate the notions of the boundaries between fact and fiction. Just as memoirs come alongside historical narratives to collectively reconstruct the shape of the past, literature also becomes a medium for this memory-history. In postmodernism, the oscillations between fact and fiction are used playfully and ironically to stimulate processes of deconstruction and revision. The metamodernist movement uses this combination to understand, deepen, and emotionally engage the past.
4. The author in autofiction appears as narrator and hero. Still, he is a narrativised version of that person rendered into writing [Worthington 2018: 2]. The author's role in contemporary autofiction restores the search for meaning and runs counter to the ironic play of postmodernist fictions wherein author characters serve a flattening function, foregrounding the constructed textual surface of the fiction.
5. Svens Kuzmins's novel in Latvian literature is one of vivid examples of 21st-century autofiction as the medium od mnemohistory which can no longer be fully described only from the perspective of postmodernism. The work's characteristic personal involvement, orientation towards depth and authenticity, linking the past and present, sense of changing eras, assumption of responsibility, non-avoidance of emotionality and refusal of postmodern hiding in cynicism encourages us to examine this and other potentially typologically close prose texts from the perspective of the latest theoretical approaches.
6. The new perspective on autofiction and other combinations of documentary and fiction in literature is associated with an inclusive and interdisciplinary attitude because "the "textual approach" and the "documentary approach" are equally to be handled and brought into relation with each other in a case specific and subtle way. To look at how a text is made does not necessarily mean to deny the "truthfulness" and the historical value of what is reported" [Wagner-Egelhaaf 2019: 5]. This attitude is consistent with the mnemohistorical perspective.

Acknowledgment

The research was carried out within the State Research Programme project "Navigating the Latvian History of the 20th–21st Century: Social Morphogenesis, Legacy and Challenges" (VPP-IZM-Vēsture-2023/1-0003).

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THE FRICTION BETWEEN MEMORY AND HISTORY: MNEMOHISTORICAL PERSPECTIVE IN CONTEMPORARY LATVIAN POETRY

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Abstract

Nowadays, in the creation of historical narratives, fiction texts are gaining increasing importance alongside historical research. It is attested by the topical trends in the early 21st century Latvian literary process manifested in the interpretation of historical topics. This article aims to highlight the significance of literature in the process of forming cultural memory and constructing historical perceptions, thereby soothing the existing friction between history and memory in historical research.

The article focuses on the interpretation of the events of the Second World War in contemporary Latvian women's poetry. As source texts the article uses poems by Andra Manfelde, Daina Sirmā and Gunta Šnipke. In the selected poetry examples, the trend of reviving historical memory and the application of a mnemohistorical perspective have been analysed. The theoretical and methodological base of the article comprises studies of mnemonic history and microhistory, research on postmemory and the ethics of memory, as well as cultural memory and trauma studies.

The examples of poetry texts by Manfelde, Sirmā and Šnipke analysed in the article reflect life writing tendencies and are highly auto/biographical. The biographical approach provides an artistic platform for the infusion of personal microhistory into the collective/nation's historical narrative. Literature thus offers a more comprehensive view of past events and their later impact and significance in a contemporary context. The poetic transformation of the wartime memories of

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.566

ISSN 2500-9974

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the postmemory generation into poetry outlines the mnemohistorical perspective, bringing to the forefront the relevance of current political events.

Keywords: *mnemohistorical perspective, postmemory generation, memory sites, war, women's poetry*

Introduction

The aim of the article is to highlight the importance of literature in the process of shaping cultural memory and constructing historical perceptions. Nowadays, in the creation of historical narratives, literary texts are gaining increasing importance alongside historical research. It is attested by the trends of the 21st century Latvian literary process, which is characterized by an active focus on the interpretation of significant events from various historical periods in different forms and genres of literature. This tendency reforms the historiographical principle of writing history by constructing a singular type of narrative rather than representing the past as it actually was. Literature offers the opportunity to soothe the existing friction in historical research between history and memory, thereby reducing "history's perpetual suspicion of memory" [Nora 1989: 8]. The Second World War is still one of the *historical hot points* of the 20th century, not only for Latvia but for all of Europe; it has received particular attention in literature, inspiring ever new artistic interpretations in various forms and genres of literary texts, including poetry. This study focuses on the reception of the events of the Second World War and the tendency to revive historical memory in the poetry books of three contemporary Latvian poets: *Poēma ar mammu* [*The Poem with Mom*] by Andra Manfelde (2022), *Dievaines* [The Days of the Spirits] by Daina Sirmā (2017) and *Ceļi* [Roads] by Gunta Šnipke (2018). The poetry examples selected for analysis resonate with the tendency in writing history at the turn of the 20th/21st century to respect the *return of the event* and the *flourishing of memory* (Tamm). It relates to the insight of German philosopher Walter Benjamin who already in the mid-20th century stated that "history is not simply a science but also and not least a form of remembrance" [Assmann 2013: 20].

The theoretical and methodological focus of the study

The theoretical and methodological base of this article is comprises studies on issues of mnemohistory and microhistory by scholars such as Heather Murray (*Literary History as Microhistory*, 2017), Jan Assmann (*Das kulturelle Gedächtnis: Schrift, Erinnerung und politische Identität in frühen Hochkulturen*, 1992), Marek Tamm (*Beyond History and Memory: New Perspectives in Memory Studies,* 2013); cultural memory and trauma studies: Aleida Assman (*Cultural Memory and Western Civilization: Functions, Media, Archives,* 2012; *Theories of Cultural Memory and*

the Concept of "Afterlife"; 2015), Dominick LaCapra (*Trauma, History, Memory, Identity:* W*hat Remains?*, 2016), Pier Nora (*Between Memory and History: Les Lieux de Mémoire*; 1989); as well as studies on postmemory and the ethics of memory: Marianne Hirsch (*The Generation of Postmemory,* 2013), Paul Ricœur (*Memory, History, Forgetting,* 2004), Eelco Runia (*Presence,* 2006), Ruyu Hung (*Ethics of memory: Forgetfulness and forgiveness in the traumatic place,* 2020) etc.

All these theoretical works reflect the mnemonic perspective so topical in contemporary historical research, capturing and analysing the dynamic interaction between memory and history. Since the rise of cultural memory theories in the 1970s–80s, a critical attitude towards official historical narratives has crystallized. Less prominent, suppressed, or dismissed memories are gradually being restored, and new sources of knowledge are being discovered and created. It is linked to the growing interest in genealogy and family studies, which has given rise to the perspective of life writing in literature. In line with this trend, the individual life story is formed and exists in correlation with the memories of the person's contemporaries, with social memory ensuring the functioning of the individual narrative in intergenerational communication. On the other hand, the timelessness of the phenomenon of cultural memory ensures intergenerational communication, transforming the transient into the eternal and marking the mnemohistorical perspective. As noted by Estonian historian Marek Tamm, there has been a change in the regime of historicity in research [Tamm 2013: 1], and thus the historian's perspective has also changed. It expands the scope of historiography from the study of past events to that of the later impact and significance of these events. The recognition of this new situation has led to a new approach to historical research which is named mnemohistory (*Gedächtnisgeschicht*e). The term was coined by Jan Assman in 1997 in the broader context of the cultural memory studies. He emphasised:

> "Unlike history proper, mnemohistory is concerned not with the past as such, but only with the past as it is remembered. It surveys the story-lines of tradition, the webs of intertextuality, the diachronic continuities and discontinuities of reading the past. (...) It concentrates exclusively on those aspects of significance and relevance which are the product of memory – that is, of a recourse to a past – and which appear only in the light of later readings." [Assmann 1998: 9]

Mnemohistory is not so much concerned with factuality, which involve abstraction and is subjected to stereotypes over time, but rather the fact itself and its possible interpretations, namely, the energy, by which the past influences the present and the present re-invents and reconstructs the past. In this context, M. Tamms' proposed connection between the event and mnemohistory becomes relevant again, which highlights the concept of *Nachleben*, first introduced in the 1910s by

the German cultural theorist Moritz Warburg. It is a concept that is difficult to translate accurately into English; it does not apply to an afterlife in the sense of another existence beyond this one, but rather should be understood as a continued life, a past that becomes relevant in the present, or a past that haunts the present. Therefore, a more suitable translation than the traditional *afterlife* could be *survival* or even *revival* [Tamm 2013: 9].

These terms most accurately describe the mnemohistorical perspective offered by the poetic examples analysed in the article, revealing the complexity of historical time and showing that "the past is woven from many pasts" [Didi-Huberman 2002: 55]. What is most important in the research of history is "to focus not on the past but on the present, not on history as what is irremediably gone, but on history as ongoing process" [Runia 2006: 8].

The method of researching the history of the work of cultural memory is characterized by a *slanted approach* to writing history, accessing the past through the present, which is essential for the process of survival or revival (*Nachleben*). The main question that it raises is: how do we remember history and how is the past interpreted? In searching for answers, microhistorical narratives are productive as they strive to redefine the goals and parameters of history so that it can fully realize its potential.

Based on the above, the concept of memory/remembrance sites (*Les lieux de mémoire*) defined by French theorist Pierre Nora is essential to the study. Nora emphasizes the idea that history is about events, while memory is about places, encompassing three essential aspects: the material, the symbolic, and the functional. In this way, a historical research direction is marked that emphasizes influence rather than determining factors; signs and commemorative signs rather than actions that are remembered or commemorated; in other words, research focuses not on the tradition itself, but the way it is created and passed on [Nora 1989: 24]. Nora's position resonates with the concept of the embodiment and emplacement of memory proposed by memory theorist Aleida Assmann in the context of memorial culture research [Assmann 2013], highlighting the significance of models of remembrance/commemoration in overcoming historical trauma, which in turn brings to the foreground questions about the ethics and responsibility of memory emphasized by Paul Ricœur [Ricoeur 2004]. P. Nora underlines:

> "Our interest in lieux de memoire where memory crystallizes and secretes itself has occurred at a particular historical moment, a turning point where conscious- ness of a break with the past is bound up with the sense that memory has been torn - but torn in such a way as to pose the problem of the embodiment of memory in certain sites where a sense of historical continuity persists. There are lieux de memoire, sites of memory, because there are no longer milieux de memoire, real environments of memory." [Nora 1989: 7]

According to A. Asmann, it is important to break away from *the superficial dichotomy between history and memory* [Asmann 2013: 21], recognizing and utilizing the possibilities of the diverse connections and interactions of these two forms, redefining identity (individual and collective), and reviving one's personal history. The task of remembering makes everyone the historian of their lives. And literature, including poetry, offers such an opportunity, namely, a way to reduce the tension between history and memory.

The poetic transformation of the wartime memories into poetry

The examples of poetry texts by Manfelde, Sirmā and Šnipke analysed in this article reflect the life writing tendencies characteristic of the 21st century Latvian poetry, with a sufficiently high level of auto/biographical nature. Such biographical approach reveals the artistic platform shaped by the dimension of individual memory for the unveiling of personal microhistory, which in turn becomes an essential contribution to the collective/nation's history narrative. All three poets represent the post-war, so-called postmemory generation [Hirsch 2012], namely, they are the children of the "traumatised parents' generation" [Schwab 2010] and experience of the Second World War indirectly, through the memories shared by their loved ones. Memory, including traumatic memory, plays a crucial role in the formation of individual and collective identity [LaCapra 2016]. The original poetic intention is deeply personal, yet talented art, as we know, always encompasses broader contexts, resonating with current geopolitical processes (such as Russia's full-scale war in Ukraine, etc.). Thus, the mnemohistorical perspective of wartime memories gains much broader significance in understanding the current situation, thereby affirming the insight expressed by American historian Arthur Danto that "to know what made an event historically important (...) would require knowing the interests of future generations" [Tamm 2013: 7].

In the analysed poetry texts by Manfelde, Sirmā and Šnipke, the starting point for the emergence of such memory-generated poetic impulse is always the "here and now" principle, as Šnipke puts it: "(...)everything is now and here and now and here and now and here (...)." [Šnipke 2018: 56] The goal of the memory policy expressed in the poets' texts of markedly lyrico-epic form is to reach the memory/remembrance sites (*lieu de mémoire*), where they can personally experience and process the experiences of their predecessors, thus preserving a sense of historical continuity and themselves becoming equal writers of history.

Andra Manfelde's *The Poem with Mom*: transfer of intergenerational experience

By touching the pains caused to her parents' and grandparents' generation by the wartime and post-war period *from below and at an angle,* A. Manfelde in her poetry book *The Poem with Mom* poetically lives through the traumatic experience inscribed in postmemory in order to learn and understand, but primarily to redefine her identity. To remember in order to heal herself. The starting point of this process is *Kalnieši* farmstead in Valtaiķi civil parish of Aizpute district – it is a memory/ remembrance site (*lieu de mémoire*), where the author can return to the memory-past in order to experience the present. At the same time, it is also a site of the poet's personal childhood memories, which can be re-experienced in her own recollections.

In search of her soul's experiences and the voice of her blood, Manfelde has already walked this path in her autobiographical family memoir *Zemnīcas bērni* [*Children of a Dugout*] (2010), attempting to illuminate the silences surrounding her family's deportation traumas and memories. In an interview with poet Ingmāre Balode, Manfelde comments on the postmemory focus asserted in the long poem (*I have not seen it/ or perhaps I have* [Manfelde 2022: 17]), professing her personal urge to react to and live through an inherited trauma in order to become the last link in the chain of the traumatic experiences.

The war experience captured in the long poem and transformed by imagination acquires new significance in the current context when war is raging again right next door, in Ukraine.[1] Manfelde says that it "feels (...) uncomfortable to reflect on war, when right next to you there are people who experience it first-hand" [Balode 2024: 35], at the same time maintaining that "(...) we are still not done thinking about and addressing everything related to the previous war" [Balode 2024: 35]. Manfelde herself features in the poem as "a girl with a memory notebook" [Manfelde 2022: 21][2], and for this reason it is so important that the poet, who was born 18 years after the war, returns to *Kalnieši* farmstead built by her mother Lidija Feldmane's (née Manfelde; 1946–2024) grandfather, in order to continue writing something what somebody else has started long time ago. It is a place where the memory of the wartime past becomes a useful tool for understanding the present and for the process of finding out a woman's identity. The experienced legacy of the war is the central vantage point for writing a woman's history: "(...) war carries away on its shoulders not only bodies / but also a maimed gender / daughters are born timid, as if wounded by frozen snow-crust, robust, with stone vests on naked silky flesh / a man takes off his clothes, but only time can remove his armour / just as do the healing..." [Manfelde 2022: 19]

1 The full-scale war launched by Russia against Ukraine on 23 February, 2022.

2 Here and henceforth the original poetry texts have been translated by Eva Eihmane.

For the fictional autobiographical author's character this process begins *on a white road*, from where her homestead behind the hills can be seen through the sallows. It is a path that must be walked alone in all seriousness, gradually revealing itself *like a river's roots* i*n the desert*, demanding more and more information about what has happened and what has been experienced at the same time. Manfelde depicts a time when the ordinary person – a woman, a child, the one frail in mind and body, the old and feeble one – dragged into the war machinery against their will, rips open the controversial logic of historical factuality, which, as we know, always is the truth of the victors –"(...) what kind of soldiers are there in Kalnieši? / meine liebe Augustin, au...au. / the Germans are accommodated in the guest room / schon and danke from morning to night / (...) then the Russian comes and does away with the fascistka" [Manfelde 2022: 15]. Memory gives back the colour to the poet and puts everything in its place, "it rises to the surface like a fish and breathes into her face, memory is everything" [Manfelde 2022: 91]. In this way, with the awareness of the duty thus invoked, the poet patiently and attentively mends the wounds of shattered memories and the gaps torn in intergenerational communication [Assmann 2013], redrawing the time-fractured family tree and herself within it: "when I have seen everything / and called it by name / I will get back / to that house, at the table, in the garden."[Manfelde 2022: 91]

Daina Sirmā's *Dievaines*: bringing back the burnt memories

D. Sirmā's poetry collection *Dievaines* forms an expressive epic composite, fusing together the past and the present, intertwined with myth and born from fantasy, yet simultaneously grounded in history. The synergy of private and collective histories takes on the contours of a mythical dimension. Using precise lexical and era-characterizing details, topographically specific place fixations (highlighting the environs of her native Dikļi and Valmiera), and the infusion of biographical elements (personal names, years, facts, etc.), as well as emphasized phonetic instrumentation (bright alliterations and assonances) the poet gradually brings to life significant events from various periods of Latvia's history, weaving them into the poetically rich narrative of her family's story.

One of the most powerful episodes of the Second World War featured in the book is related to a site of special importance in the poet's life: it is the tragic burning of Valmiera on the fateful night from 22 to 23 September 1944, when the historic centre of Valmiera was devastated by widespread fires, which miraculously stopped at the Orthodox Church of St. Sergius of Radonezh in the western part of the town and at the Evangelical Lutheran Church of St. Simon in the east, sparing both churches: "(...)Sergius and Simon look on / with a foot they tap the rhythm, clap their hands / the fire will not catch the temple / the walls are saturated with

prayers full to overflowing" [Sirmā 2017: 65]. In a way, D. Sirmā contributes to the discussion about the interpretations of the mentioned historical event, which is affected by the changes of the political paradigm – "The fire-god greedily drinks the sacrificial smoke / having drunk his full, he makes a row / rearranging the constructs of the great powers" [Sirmā 2017: 66]; "blame for the arson shifts along with the change of the great powers." [Sirmā 2017: 68] The reality outlined in the epic poem *Burning of Valmiera* – "the residents of Valmiera, like forest beasts, crawl out from the bushes / after the dreadful night when in the black skies / a burning city has risen like a red sun / the streets have collapsed into heaps / no longer distinguishing the sites of houses" – enters into the focus of postmemory in the present day, which is "(...) now / our eyes – ash-covered / our features – petrified" [Sirmā 2017: 68], strongly highlighting the contemporary context. In the autumn of 2024, 80 years expired since the tragic for Valmiera event, which irrevocably changed the town's face and deformed the memories of its residents about the historic pre-war town. The still persisting tension between memory and history raises questions about a more complete picture of the truth regarding this historical event, which took place under the influence of various factors: coincidental circumstances, deliberate malice, or strategies of political games/plots, etc. An important contribution to the research of this historical fact is the traveling exhibition *1944: The War-Caused Fractures in Latvian Urban Landscape* prepared by history researchers withing the framework of the State Research Programme project *Navigating the Latvian History of the 20th–21st Century: Social Morphogenesis, Legacy and Challenges*.[3]

Gunta Šnipke's *Roads*: quest for the wartime truths

G. Šnipke's poetry collection *Roads* is the poet's attempt by feeling to find the truth about history, both the public and private one, raising a rhetoric question about *the blame laid on history*, about what has been attributed to history and written as history, about myths and legends that have grown around history, and probing the dead ends of history and the still unresolved issues. The poet explains very specifically the overarching task she has set for herself: "to weed out hatred

[3] In Valmiera, the exhibition was opened in Hanza Square on 17 September 2024. The exhibition tells about war-caused destruction and its consequences in several Latvian towns, including Valmiera. The open-air exhibition tells the story of the destruction of the Latvian cities that suffered the most from Soviet air raids and the German-USSR war in April-October 1944 – Rēzekne, Gulbene, Jelgava, Bauska, Valmiera and Riga. It shows how the architecture of cities and their appearance were often changed almost beyond recognition as a result of the war. At the same time, especially in the context of Russia's aggression in Ukraine, the exhibition reminds us of the devastating impact of war on all areas of society, emphasizing the need to protect Latvia's cultural and historical heritage and to recognize the importance of comprehensive national defense.

from my memories" [Šnipke 2018: 26]. By restoring with poetic means the memory versions of wartime events of her family (from both the paternal and maternal sides), a strong awareness of the past is created, yet it is not dramatized or presented in overly tragic terms. From this vantage point, in poem *Kurzeme / Noontime* Šnipke speaks about her father's mother whose "husband and son have lead under their ribs / and the mishmash between them / is the front line" [Šnipke 2018: 12]. On the other hand, her mother's[4] most cherished wartime memory is embodied in her velvet student's cap, which is the only tangible evidence surviving from her time at Jelgava Teacher Training Institute, where her studies were interrupted by the war. Her mother's wartime memories have been transferred also to Šnipke's poetry book *Kā* [How], which was published in 2024. There she again asks her mother: "how was it / when the frontline was rolling away and back again / and right over your head" [Šnipke 2024: 59]. The words of comfort: "a person gets used to everything" [Šnipke 2024: 59] crystallized in an improvised dialogue between the poet and her mother who passed away already ten years ago, do not provide assurance that one can and should ever get accustomed to war. The poet emphasizes that wartime poetry [Šnipke 2024] is written in the name of a better tomorrow.

Two poetry examples should be singled out in Šnipke's collection *Roads*: they form a dialogue, tensely strained by wartime historical memories, resonating with the model of dialogical memory defined by A. Asmann, asserting the necessity of maintaining significant symbols of memorial culture (such as burial sites, commemorative signs, monuments, etc.) as an essential fact of memory ethics, an instrument for overcoming traumatic memories, while simultaneously strengthening the national identity of the memory bearer and transcending the boundaries of national memory. Thus, the poet offers a perspective of transnational memory that is so significant in the modern context. As Asmann emphasizes, the traumatic legacy of the history of the violence of the world war "can no longer be processed through the limited grammar of traditional national memory constructs" [Assmann 2013: 155].

The first example is the fate of Smuidris, the older brother of the poet's father, embodied in poem *Lestene/Brother Smuidris*, which bespeaks of the fallen under both flags (Russian and German). In 1943, at the age of 18, father's older brother Smuidris Šnipkis (1925–1945) was drafted into the legion[5], was killed soon thereafter and is buried in Lestene cemetery. The legionnaires' cemetery in Lestene has become a site of memory/ remembrance (*lieu de mémoire*), which in a condensed form captures tragic and traumatic turning points of both private and larger 20th century history

4 Poet's mother Elena Šnipke (1927–2013) was a long-time lecturer at Liepāja Teachers' Institute.

5 A formation of the Nazi German Waffen-SS during the Second World War (1939–1945)

that significantly influenced the course of future events. In the poem, the wartime event associatively evokes a series of other tragic occurrences in the family's history – the enlistment of the poet's half-brother, Marts Šnipke (born in 1967), in the Afghanistan war in 1985, which in turn leads to the death of his grandmother (mother of the poet's father) Olga Šnipke (1898–1985) who died from anguish over her grandson's fate. The poet's daughter Alma (1990) and grandson little Jānis (2013) are also inscribed in the poem, to some extent as heirs of the traumatic wartime memories: "(...) my daughter in England is raising a son, almost happily / but / here all around, an army of the unborn under the piles of stones is too large to count / (...) I remember an old soldier saying that there were the right goals on both sides, just under wrong flags" [Šnipke 2018: 28].

The second example – poem *Daugavpils* captures Šnipke's personal experience from her job as a guide and interpreter for the German and Latvian youth camps organised by *Volksbund Deutsche Kriegsgräberfürsorge* society[6] based in the German Federal Republic, the participants of which spent two weeks, clearing/ restoring/ polishing concrete crosses and sometimes tidying up graves literally lost in the forest. In the poem, one such occurrence develops into a process of the purification and polishing of transnational memory. The rhetoric that the poet applies: – "what did you come here for, little boy" – and her promise – "little boy, let me give you back for the sake of your far-far-away mother's peace of mind, may she rest in peace" [Šnipke 2018: 27] – again and again forces memory to make the past a part of the present, which is the most important task of mnemohistory.

Conclusions

It is a topical trend in the contemporary Latvian poetry process, including women's poetry, to write history by synthesizing private and public historical experiences, thereby contributing to the process of shaping cultural memory and constructing historical narratives. In poetry by D. Sirmā, A. Manfelde, and G. Šnipke, the memory sites singled out in intergenerational communication acquires the functions and significance of the keepers of memory archive. The analysed poetry examples testify that in the poetry language, too, it is possible to assert one's identity and place in the history of one's family, which in turn becomes part of the historical narrative shaped by collective experiences. It is a way to uphold the idea of the continuity

6 Volksbund Deutsche Kriegsgräberfürsorge – an organisation similar to the Latvian Fraternal Cemetery Committee, which takes care of the German soldiers' burials in other countries, organises organizes the search for the remains of deutsche soldiers, their reburial, the identification and cleaning of existing graves. The Volksbund supports relatives and advises public and private institutions, and promotes the education of young people on issues of memorial culture internationally.

and permanence of cultural memory. In poetry, the fictionalism of memory comes to the forefront, the boundaries between the past and the present become blurred. The poetic (re)construction of the past responds to the topical aspects of the present and to the eternal existential questions, triggering a process of identity redefinition and a discussion about the role of history in understanding contemporary events, while highlighting the moral and ethical aspects of complex geopolitical conflicts. This trend in poetry writing marks a mnemonichistorical perspective, where the actualization of past events gains new interpretative possibilities in the context of contemporary global developments.

Acknowledgment

This research is funded by the Latvian Council of Science, project "Navigating the Latvian History of the 20th–21st Century: Social Morphogenesis, Legacy and Challenges" (No. VPP-IZM-Vēsture-2023/1-0003).

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THEATRE, FILM, AND PERFORMANCE STUDIES

HISTORICAL NARRATIVES IN CONTEMPORARY LATVIAN THEATRE: CONSTRUCTING SOCIAL IDENTITY

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Abstract

This research explores the relationship between theatre narratives and the formation of collective memory and social identity in contemporary society. Focusing on Latvia, the study examines how current theatrical practices represent twentieth-century historical events – particularly those related to the Second World War and its aftermath – and how these representations influence national social consciousness and cultural trauma. While grounded in the Latvian context, the analysis highlights the broader relevance of these issues within European discourse. Using frameworks from memory studies and social identity theory, the study explores how performance narratives serve as tools for shaping social identity and collective memory. The findings suggest that Latvian repertory theatre predominantly promotes a humanistic collective memory, but also point to the need for narratives that acknowledge the nation's victimhood under occupation and promote a positive sense of identity among younger generations.

Keywords: *collective memory, social identity, historical narratives, trauma, contemporary Latvian theatre*

Introduction

The focus on the relationship between theatre narratives and the formation of collective memory and social identity in contemporary society is what this research explores. It looks at how these representations influence social consciousness and

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.549

ISSN 2500-9974

CULTURE CROSSROADS

examines attitudes towards the cultural trauma left behind by the occupation. While based in the Latvian context, the analysis shows how these issues are relevant to European discourse, particularly in post-Soviet societies grappling with questions of historical interpretation and national identity. In the late 1980s, national identity gained prominence in Latvia as a direct challenge to the Soviet-promoted sense of social belonging. This emphasis culminated in the Singing Revolution and the broader Awakening movement, which decisively de-occupied the country [Blinkena 1998]. Subsequently, as Latvia sought integration into European institutions, the focus shifted from reconciling a threatened national identity to embracing democratic values and adapting to broader European cultural standards. As Kõresaar notes, "After an intensive period of retrospective justice that gave the victims the long denied and much needed recognition but also turned their stories to sole representatives of the nations' past, the social memory of Baltic societies over the previous decade has experienced certain emancipation from the hegemony of anti-Soviet representation." [Kõresaar 2019: 17] However, this shift raises questions about the potential risks of self-censorship or identity dilution under external pressures to conform. Scholars of the post-Soviet context, for example, warn of the tendency towards cultural homogenisation and the possible suppression or marginalisation of the histories and narratives of smaller nations [Suciu, Surea 2015: 30]. While these processes promote fundamental democratic values, they can also lead to a distancing from uncomfortable aspects of national histories, with implications for how collective memory is maintained and transmitted.

This article is part of a broader study within the National Research Programme *Research on 20th and 21st Century History and Human Capital Regeneration* (No. VPP-IZM-History-2023/1-0003). The objective of this study is to analyse how contemporary theatre interprets and shapes collective memory of 20th-century historical events, with a particular focus on Latvia's experience during the Soviet occupation and its aftermath. The central research question guiding this study is, as follows: How do theatre performances in Latvia function as sites of collective memory, and what role do they play in shaping social identity in relation to Latvia's traumatic historical experiences? A thorough examination of intergenerational theatre productions dealing with these historical events demonstrates that younger Latvian theatre-makers are eager to proactively explore the past. It is evident that these representations facilitate a nuanced comprehension of contemporary geopolitical realities. In contrast, the traumas experienced by preceding generations appear to be less immediate or personally relevant to contemporary creators. [Levalde 2024] This observation underlines the importance of investigating how collective memory of the Second World War and Soviet occupation is constructed and transmitted through theatre, contributing to social cohesion and cultural identity.

Theoretical underpinnings of the analysis

The analytical framework relies on a combination of theoretical perspectives. Firstly, theatre semiotics [Elam 1980] – the study of how meaning is created through signs and symbols – informed the interpretation of staging, character interactions and the visual and auditory elements of the performances. Second, narratology [Genette 1980], with its focus on narrative structure and storytelling techniques, guided the analysis of plot, character development, and how the performances conveyed their messages. Finally, the framework incorporates memory studies, particularly the work of Assmann on cultural and collective memory, and Hirsch's concept of postmemory. According to Aleida Assmann [Assmann, A. 2008], institutions such as nations do not inherently possess memory; rather, they "create" it through symbols, texts, rituals and monuments that forge collective identities. Jan Assmann [Assmann, J. 1988] extends this by proposing the concept of cultural memory, which refers to the enduring significance of key historical events *fixed points* – that are maintained through cultural constructions, including theatre. The concept of postmemory, developed by Marianne Hirsch [Hirsch 2012], emphasises that the historical experiences of previous generations are transmitted through cultural texts and performances, shaping the identities of subsequent generations who did not experience these events directly. Social identity theory [Tajfel & Turner 1979], which posits the notion that individuals derive a proportion of their sense of self from their group membership, provides a framework for comprehending how nations forge their identities on the basis of shared historical references and the manner in which these collective histories influence perceptions of in-group/out-group distinctions. By combining these approaches, this research aims to identify the key narrative strategies employed by theatre makers as authors to construct and communicate specific messages related to collective memory and social identity. As Wayne Booth asserts, "In short, the author's judgment is always present, always evident to anyone who knows how to look for it. (...) As we begin now to deal with this question, we must never forget that though the author can to some extent choose his disguises, he can never choose to disappear." [Booth 1983: 20] This quote underscores the importance of critically engaging with theatrical narratives, recognizing that creators embed their own perspectives and biases within their storytelling; therefore, a central aim of this methodological approach is to acknowledge the unavoidable influence of the theatre creators' perspectives on the narrative.

Methodology

This study employs a qualitative interpretive approach to analyse select contemporary theatre productions from Latvia that address the country's traumatic history, particularly the Soviet occupation and World War II. This approach does

not aim to evaluate the artistic quality of the selected performances, but rather to explore their role in shaping collective memory and social identity through a focused analysis of their narrative and performative strategies. This section will outline the specific methodologies and theoretical frameworks used to achieve this objective. The data collection process consisted of several key steps: viewing the performances to understand staging, performance, and impact; analysing scripts to identify themes, structures, character development, and dialogue contributing to collective memory and social identity; and examining the staging, set design, costumes, lighting, sound, and other symbols to assess their significance and impact on the audience. The analysis particularly focused on the narrative elements of each performance, including plot structure, storytelling techniques, and narrative voice.

War and its aftermath: Performance selection rationale

In the context of trauma, World War II holds particular significance for Latvia, which experienced multiple occupations and endured the Soviet annexation for fifty years. The ongoing Russia-Ukraine war has revived this traumatic past, bringing the themes of war and its consequences to the forefront once again. Over the past seasons, numerous theatre productions have addressed these themes, reflecting on the enduring impact of war on society. Given this landscape, several key criteria guided the selection of specific performances for this study, ensuring a focused and meaningful analysis of how Latvian theatre engages with collective memory and social identity. First, the performances chosen were those staged outside the capital, Rīga. This was deliberate, as regional theatres often operate with greater artistic autonomy and may be less subject to the influences of national cultural policies or dominant narratives prevalent in the capital. This independence allows for a potentially more diverse range of perspectives on historical and cultural issues. Second, the productions chosen did not receive state target subsidies. Productions funded by specific government grants may be subject to certain expectations or guidelines, potentially influencing the dramaturgical material and thematic content. By focusing on performances created without this direct financial support, the study aimed to capture artistic expressions that the creative team's vision, rather than external pressures such as contractual obligations with the Ministry of Culture, primarily drove. Third, it was essential to select productions by professional theatres. This criterion ensures a baseline level of artistic competence and production quality, enabling the application of equivalent analytical criteria across all selected performances. Professional theatres typically have established artistic teams, experienced actors, and dedicated resources, allowing for a more sophisticated and nuanced exploration of complex themes.

To explore the interplay between theoretical frameworks and theatrical practice, three productions have been selected for analysis, each offering a unique perspective

on collective memory, social identity, and national trauma. The following productions are to be considered: *The Diary of Anne Frank*, *Survival Notes*, and *In the Name of Love*. The analytical process was iterative, involving multiple rounds of coding and interpretation to refine the identification of key themes. The initial viewing of the performances revealed a broad range of potential themes related to collective memory and social identity. Close analysis of the scripts and staging methods, coupled with a consideration of audience reception (as documented in reviews and online commentary), then allowed for a refinement of these themes. The research question guided this process, ensuring the analysis focused on the relationship between theatrical narratives and the construction of collective memory in Latvia.

Although *The Diary of Anne Frank* is widely known within the context of the Holocaust, its themes of civilian victims of war gain renewed resonance in light of the current geopolitical situation, particularly Russia's war in Ukraine. This connection makes its inclusion in this analysis particularly relevant. The Liepāja Theatre's production, directed by Laura Groza, adapts Wendy Kesselman's Broadway version, emphasizing the story of the Holocaust from a teenager's perspective. By presenting the Holocaust through the eyes of a young girl and by avoiding the use of Dutch and German accents, Kesselman's production seeks to emphasize what ties the Holocaust and its universal scale, as explained by Assmann, whose work is rooted in building collective memory through storytelling to avoid cultural context. Kesselman's version minimizes freedom of interpretation through directions and theatrical expressions, which also supports Assmann's ideas, where historical evidence of humanism can assist in unifying the nation and encouraging the adoption of the group membership. Audience responses confirm the impact on constructing memory through trauma. Even in a global setting, audiences are able to tie the events of the holocaust to the war in Ukraine, which suggests that the stage production has a purpose of showing a specific tragedy that will allow others to establish a connection between the past and present.

The production *Survival Notes*, created by playwright Krista Burāne and director Mārtiņš Eihe, uses the war in Ukraine as a historical analogy, referencing Edvīns Šnore's film *Soviet Story* to depict a regime slaughtering its own people on an industrial scale. The play deliberately links the crimes of the Russian-speaking army in Berlin with those in Ukraine, shifting the focus from the "regime" to a specific culture – Russian – in wartime conditions. Burāne's emphasis on "criminals speaking in the language of Pushkin" [Burāne 2024] reveals the shocking content of journalist Marta Hillers' diary entries and the attempt to use historical memory to condemn the present. By depicting the horrors of the Russian-led war in Ukraine, the play aims to influence the audience's understanding of historical events by reinforcing identities, including the identity of the "aggressor".

The Liepāja Theatre production *In the Name of Love* explicitly addresses social identity by presenting a broader understanding of the ethnic group shaped by historical perceptions. Beginning with the biblical story of Eve and Adam in the Garden of Eden, the production introduces the theme of "family" and questions its connection to "Latvian sexuality". Through a free interpretation of Garlieb Helwig Merkel's tract *The Latvians*, the playwright emphasises the negative characterisation of the nation from the perspective of the out-group, portraying Latvians as animals and a tribe far removed from civilisation. This negative portrayal reflects on collective memory, as Merkel appears in the foreground to make the performance a critique, questioning conventional views of national identity by highlighting different historical views. By using a blend of buffoonery, folk songs, and excerpts from classics, the performance combines a witty farce, ironic fragments, and poses from a book on sexual relations published during the Soviet era. The play emphasizes the negative image of the nation in different periods of history, and is particularly harsh on Latvian collaborationism during the Soviet occupation. By prompting the audience to question their own values, this performance may function as a means of cultural critique of Latvian society. The performance supports Assmann's concept of collective memory, which emphasizes that nations should choose historical views to support their self-esteem and encourage action.

Anne Frank: Staging memory

Her father, the sole survivor of the Holocaust, published Anne Frank's Dutch diary, written during her two-year hiding in an annex with another Jewish family, posthumously. Anne died of typhus in Bergen-Belsen. The diary exists in two versions: *Version A*, in notebooks, and *Version B*, her transcription on loose sheets from 1944, prepared after hearing her diary would be used as documentary evidence. Otto Frank edited and published these fragments as *Version C* in 1947. [Amsterdam District Court 2015] The 1956 play by Hackett and Goodrich, based on this version, won the Pulitzer Prize and depicts Anne's story without emphasizing her Jewish identity, highlighting "a pure heart in a time of horror" [Anne Frank Fonds]. Wendy Kesselman's 1997 Broadway adaptation included later fragments and clarified the historical context, with stage directions meticulously regulating interpretation, including projections of Anne's words across the stage and instructions to avoid Dutch or German accents to reflect the Holocaust's global scale. [Goodrich, Hackett, Kesselman 2016] This careful selection of facts and choice of contextual emphases in the publication of wartime testimony is fully in line with Assman's concept of building the collective memory of a nation. The Liepāja Theatre production used this adapted version, translated into Latvian by Ieva Viese-Vigula, although it did not completely follow the established interpretation guidelines.

Figure 1. A scene from Liepāja Theatre's production "The Diary of Anne Frank" (2024). Photo: Justīne Grīnberga

Anna Fischer's original music for a string quartet, harp, piano, and double bass is included in the soundscape, enhancing the emotional backdrop of the performance. Anne is a cheerful teenager who first sees hiding as an adventure, then gradually matures and experiences her first love. The emotional scene of the Jewish ritual of Hanukkah, with its songs, prayers and gifts arranged by Anne for each of her fated companions, helps to shape the message of the play. That the only formula for survival, then and now, is to maintain humanity, respect and love for one another. By staging the Holocaust in this way, the production emphasizes the universal value of human life and frames the tragedy as a global event, transcending specific national contexts. It is important to note that the production is supported by the Latvian fund *Uniting*, which has financed several studies related to the Holocaust and their integration into artistic works, thereby keeping the memory of the Holocaust alive in Latvian society.

The feedback from the audience and theatre critics differs in evaluating the artistic quality of the performance but aligns on the social and political context of the production. One-audience review states: "After the performance, the atmosphere is dual. One must think of the immense tragedy as a whole, not just of Anne's family, and about the current massacre in Ukraine." [Sedoro Ice 2024] In the theatre critic Ilze Kļaviņa's review: "The war in Ukraine unfortunately reminds us today of the brutality of the Holocaust, violence, and nihilism towards human life and

existence." [Kļaviņa 2024] The production elicits empathy from viewers, embracing the Jewish primary role – the victim – in history while allowing a connection between the depicted tragedy and the current geopolitical situation, not linking it to the Israel-Palestine conflict but to the Russia-Ukraine war, distinctly separating victims from perpetrators in consciousness. In Guna Zeltiņa's review, the Holocaust performance is linked not only to the contexts of Russia and Ukraine but also to Latvia, pointing out similarities in cultural trauma:

> "The new production at Liepāja Theatre – The Diary of Anne Frank – directed by Laura Groza, thematically fits both the director's prior productions at the Russian Theatre in Rīga, namely With Dancing Shoes in Siberian Snow and Stage on Fire, as well as the contemporary context of global insecurity and impending warfare." [Zeltiņa 2024]

In the last decade, the tragedy of the Holocaust has increasingly been viewed in the public sphere in terms of historical responsibility, examining Latvian involvement in the Holocaust and its passive observation while simultaneously praising Jewish rescuers, thus reaching a reconciliation with historical experience and allowing it to be seen as a lesson for the present.

Survival notes: Performing analogy

The war in Ukraine is used as a historical analogy in the production *Survival Notes* created by dramatist Krista Burāne and stage director Mārtiņš Eihe. The production, like Edvīns Šnore's film *Soviet Story* made in 2008 at the *Labvakar* studio, tells of a regime, which slaughtered its own people on an industrial scale. As stated on the film's website, "Assisted by the West, this power triumphed on May 9th, 1945. Its crimes were made taboo, and the complete story of Europe's most murderous regime has never been told." [Šnore 2008] The production *Survival Notes* deliberately links the crimes of the Russian-speaking army in Berlin with the crimes of the Russian-speaking army in Ukraine, shifting the focus of memory from the "regime" to specific culture – Russian – under wartime conditions. The events in Berlin in 1945 are reflected in the insights of contemporary Ukrainian journalist Oksana Zabuzhko into what is happening in Ukraine today.

The emphasis on "criminals speaking in Pushkin's language" [Burāne 2024] is fully revealed in the diary entries of journalist Marta Hillers, and the shocking content of these texts is also reflected in their fate. Initially published anonymously in 1954, the author's identity was only revealed after her death in 2013. In Latvia, a book titled *A Woman in Berlin* was published in 2023, also without the author's name. "After the original publication, the book sank without trace in a country that had decided to deal with the horrors of its immediate past through collective silence.

Figure 2. "Survival notes" (2024) VDT. Marta Hillers – Gerda Embure, Russian – Mārtiņš Liepa. Photo: Matīss Markovskis

But since the end of the Cold War, and German reunification, writers and historians have begun to deal with the theme of German suffering." [Harding 2003] The thesis "victors are not judged", which prevailed in the Western world until the collapse of the USSR, must be recognised as false, even criminal, in the context of the Ukrainian war. This is the message of the production *Survival Notes*. The actress Gerda Embure plays Martha Hiller, balancing the documentary's taut but laconic narration with spontaneous physical openness: From the cold numbness of submission to the rapists to the tearful, gaze into the distance. Each rape is symbolically marked by the removal of a dress. As the performance continues, more and more of the women's torn dresses pile up on the floor of the barn, like bodies violently robbed by marauders. This confrontation of the intersection of history in 1945 and now in 2025 makes us look at war differently. It is not just a brutal clash of states and ideologies with collateral damage; it is the individual tragedy and undeserved suffering of people at war against their will. The social value of photojournalist Hiller's memoir lies in its exploration of the psychology of the victim and the perpetrator, illustrating that military aggression is closely linked to moral degradation; thus, the relationship between victim and perpetrator cannot be defined solely on the level of national identity.

In the Name of Love: Deconstructing identity

If the influence of the aforementioned productions on the formation of the social identity of the Latvian population is indirect and centred on the phrase "I am a human", the Liepāja Theatre production *In the Name of Love* explicitly conveys a broader understanding of the social identity of its ethnic group, shaped by historical perceptions. Introducing the theme of "family", the production begins with the biblical story of human creation – the story of Eve and Adam in the Garden of Eden, which has nothing to do with the "history of Latvian sexuality" declared by the play's creators, since the Latvians were not Christians in the beginning, but worshipped nature and natural phenomena. They worshipped female deities in connection with fertility and the family. It is possible that the theatre creators wanted to emphasise the introduction of Christianity as the beginning of dogmatism. The next episode already shows degenerate Latvians. It is a free interpretation of the tractates *The Latvians*, written in 1796 by a German author, an Enlightenment thinker and campaigner for the abolition of serfdom, Garlieb Helwig Merkel (1769–1850). In her explication, the playwright emphasises the negative characterisation of the nation from the perspective of the out-group, or the German: "Garlieb Merkel steps into the foreground; he perceives Latvians more as a colony of animals or a tribe that stands far removed from civilisation. In the background, a grim scene is visible; depicting impoverished, dishevelled Latvians whose appearance enhances and even illustrates Merkel's texts." [Muižniece 2024: 3] What follows is a witty farce with elements of buffoonery, in which interpretations of cheeky folk songs, ironic fragments from various classics of Latvian literature, and poses from the first book on sexual relations published during the Soviet era – Jānis Zālītis's book *In the Name of Love* – are woven into the movement score. Thus ends the first act.

The second act begins with a caricature of the historical context of the Soviet occupation. The authors of the production have chosen a traditional Latvian celebration – *Jāņi* (Midsummer) – as a fixed point of the Soviet occupation, giving this episode the title *The Fern Flower* and associating it with one interpretation of this symbol – sexuality. However, this episode, deviating from the theme of intimate relationships, addresses one of the national traumas – collaboration with the occupying regime. In this episode, all the men are named Jānis, the traditional Latvian name, while the women are called Līga, Janīna (Latvian names), and Alyona (Russian name), who speaks with a strong Russian accent. In a relatively friendly conversation about Midsummer traditions, one of the men suddenly emerges as a primitive, intellectually uncomplicated USSR KGB agent, called "Chekist" in Latvian: "From now on, you must call Midsummer Līgo! The only desire will be to gorge and get drunk, to hit one another and drive while intoxicated." [Muižniece 2024: 29]

Figure 3. *In the Name of Love* (2024) at Liepāja Theatre. Actors: Agija Dreimane, Kārlis Artejevs, Valts Skuja. Photo: Justīne Grīnberga

Then, Soviet-ideology-praising parodies of Midsummer songs are chanted. If the production had flowed until that point as a stylistically pure, witty farce about Latvians and their weaknesses, the interpretation of the Soviet era rejects the nation's victim role and the complexity of the historical situation. It is possible that collaboration, unlike the Holocaust, has not been sufficiently discussed in society to overcome it as a cultural trauma and to achieve reconciliation with this historical experience. Historians also acknowledge this: "(...) many human decisions and actions during the Soviet period do not lend themselves to simple evaluations; similarly, the collective mentality and morality of that time (or its Soviet decay) cannot be defined in a few words or sentences, nor be placed into a straightforward matrix of "what is good?/what is bad?" [Kaprāns, Zelče 2010: 20] Nevertheless, the production's creators strictly employ categorical matrices and express a desire to distance themselves from a social identity related to national belonging. This is also evidenced by other details of the play – in the background of the Eden scene, an American band, *The Magnetic Fields*, plays *The Book of Love*[1], and during the dialogue between Latvian national poets Rainis and Aspazija, the song *Je t'aime...*

[1] https://www.youtube.com/watch?v=7FtbrDFgB_4

moi non plus by Serge Gainsbourg and Jane Birkin[2] serves as an ironic commentary on the situation. In a final episode that caricatures Latvian politicians, negatively constructed characters invoke national belonging. This stage interpretation in the second act evokes a radically different audience response, signalling serious rifts in the formation of cultural memory.

Conclusions

This study set out to examine how theatre performances in Latvia function as sites of collective memory, and what role they play in shaping social identity in relation to Latvia's traumatic historical experiences. The analysis of *The Diary of Anne Frank*, *Survival Notes*, and *In the Name of Love* reveals that Latvian theatre serves as a crucial arena for negotiating collective memory, engaging with traumatic historical experiences, and shaping national identity. Through diverse narrative and performative strategies, these productions actively construct, challenge, and transmit cultural memory, contributing to a complex and evolving understanding of Latvia's past and present. This aligns with previous claims regarding theatre's role in shaping cultural understanding [Levalde 2024]. The performances underscore the fact that collective memory is not a static entity but a constantly evolving narrative shaped by cultural forces, including theatre [Assmann, A. 2008]. The *Diary of Anne Frank* provides a humanist narrative; *Survival Notes* employs a historical analogy of the war in Ukraine, and *In the Name of Love* questions national identity through historical interpretations. While the scope of the data limits the generalizability of these conclusions, the performances underscore how key themes are interwoven. A key point remains the underlying tensions between victimhood and cultural identity, especially regarding in-group/out-group distinctions, national pride, and trauma [Assmann, A. 2008]. Further research, focusing on audience analysis, is essential to determine how audiences receive the intended message, or reject it completely. Further research into cultural identity formation in Latvia is required to answer the questions raised by this study.

Acknowledgment

The research was carried out within the State Research Programme project "Navigating the Latvian History of the 20th–21st Century: Social Morphogenesis, Legacy and Challenges" (VPP-IZM-Vēsture-2023/1-0003).

[2] https://www.youtube.com/watch?v=JIQiGN-vO-g

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THE BOUNDARY BETWEEN: WHO AND HOW BREAKS THE FOURTH WALL IN THEATRE

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Abstract

The convention of the fourth wall remains dominant in Western theatre. However, the boundary between actors and audience has become increasingly ambiguous. Although various methods are employed to break the imaginary fourth wall, a notable gap exists in research regarding their classification and the underlying purposes these methods serve. This article seeks to address three research questions: What is the fourth wall? What does it mean to break the fourth wall? And how are these methods used in theatre?

The first two sections of this article provide a historical overview of the concepts of "the fourth wall" and "breaking the fourth wall". The third section shifts focus to contemporary practices, with an emphasis on 21st-century Estonian theatre. Through the analysis of different examples, the study identifies and categorizes three primary approaches to breaking the fourth wall: instances where the performer directly breaks the wall, moments of alienation that disrupt the audience's immersion, and cases where the audience themselves breach the boundary. This classification offers a clearer understanding of how these methods function and their significance in reshaping the dynamics of modern theatrical experiences.

Keywords: *fourth wall, breaking the fourth wall, audience participation, Estonian theatre*

Culture Crossroads
Volume 31, 2025, https://doi.org/10.55877/cc.vol31.560

ISSN 2500-9974

CULTURE CROSSROADS

1. The fourth wall rises

One cannot imagine theatre without the existence of an audience. However, there has always been an invisible boundary that separates performers from spectators and divides the theatrical illusion from the everyday reality. This is now widely known as "the fourth wall" – an imaginary wall that separates the audience from the performer, who acts as not being aware of the audience [Eesti Keele Instituut 2023].

Regarding the fact that the invisible barrier separates actors from audiences, it is important to distinguish the two layers of the fourth wall. First, there is an invisible, but perceptible boundary that exists in the **theatre space** and is affected by the architectural and scenographical conditions of the venue. For example, one could easily draw a dividing line in a proscenium arch theatre, as the proscenium arch itself is usually visually distinguishable, creating an illusion of a frame on the wall. However, the boundary is not so specifically defined or perceived in site-specific or promenade theatre where the stage area is not always discerned from the hall, and actors could, for example, move between audience members, blurring the line even more.

So, the arrangement of the theatre stage and auditorium plays an essential part in distinguishing performers from audience members and can act like a precondition to the second layer that exists in the **fictional space** which is perceived by both performers and spectators. Depending on the concept of the theatrical production, the separating line can be strictly in place, meaning that the audience members should stay behind the fourth wall and act according to the convention, or blurry, breaking the fourth wall down by turning to the audience. Regarding this, the fourth wall works as a silent agreement between the actors and audience members. When the fourth wall is broken, the conventional role of the audience is also being challenged.

The goal to establish an invisible wall between the actors and the audience was first articulated by the French philosopher, art critic, and theorist **Denis Diderot**, who wrote in 1758: "don't think about the spectator anymore, act as if he doesn't even exist. Imagine there is a big wall at the edge of the stage separating you from the parterre. Act as if the curtain was never raised." [Diderot 1970: 453] So, the imaginary wall is invisible to the audience, but the performers should act like the wall is opaque as they do not see the spectators.

This new convention required a completely new approach from the actors and writers. For example, Diderot started to write dialogues in prose to emphasize the naturalness of the text being presented from the stage. [Benedetti 2007: 39–40; Holland, Patterson 1997: 272–273]. **André Antoine**, the founder of Théâtre Libre, is considered one of the first pioneers, whose interest in new realistic and naturalistic authors (such as Émile Zola, Henrik Ibsen, and August Strindberg) and

the revolutionary ideas arising from the plays he read paved the way for the illusion that the audience was really in the hall behind an invisible wall [Esslin 1997: 343]. The invisible wall was named as the fourth wall, as Antoine's co-star French critic and playwright **Jean Jullien** wrote: "(...) the fourth wall is transparent to the audience, opaque to the actor." [Schumacher 1996: 78] Regarding this, it was Jullien who was the first to treat the invisible border between the actors and the audience as a fourth (not an invisible) wall. The reason lies in the changing theatrical space: as the significant developments in the architecture of European theatre buildings shifted the performer and the audience further apart, the proscenium arch acquired a new separating function, moving the stage into a box with three physical walls [Baugh 2013: 11–15]. Consequently, the invisible wall was conceptualized as the fourth wall.

In the late 19th century, European theatres also began adopting electric lighting, marking a significant shift in theatrical practice. Previously, audience members often directed their attention not only to the stage but also to others in the auditorium. However, the darkening of the auditorium refocused the audience's gaze exclusively on what was happening on the stage. This change, coupled with advancements in theatre architecture, scenography, and lighting technology [Camp 2022: 184], transformed the audience's role from vocal critics to more passive, anonymous observers [Heim 2006: 65–66]. The audience now engaged with the stage events as if peering through a secret keyhole, fostering the conditions for a greater imaginary distance between performers and spectators.

The principles of a realistic style of acting were further developed by the Russian actor, director, and acting teacher **Konstantin Stanislavski**, who paid more focused attention to the training of actors and laid the foundations for a revolution in the art of acting and directing in Russia, the influence of which extended beyond the borders of Europe [Esslin 1997: 352–353]. Stanislavski's training is based on the principle of ignoring the audience and what is happening in the auditorium – thus, Stanislavski is credited with creating the concept of the fourth wall. By establishing the fourth wall, the audience should forget that they are watching a finely honed work of art. For example, following Stanislavski's teachings, actors began to perform on stage both in profile and with their backs to the viewer, in contrast to the previous style of acting, where the text was predominantly delivered from the front, facing the audience [Benedetti 2007: 109–110].

To establish the fourth wall, Stanislavski developed various exercises to achieve full stage presence and attention. One such concept is "public solitude", according to which an actor must behave on stage as if he were completely alone in the room, but at the same time be aware of the public nature of his actions. "You are in public because we are all here. It is solitude because you are divided from us by a small circle of attention" [Stanislavski 1989: 90]. According to Stanislavski's description, circles

of attention are used to concentrate and control attention, where the actor's focus moves from one level of communication to another, becoming narrower or wider according to the situation or exercise. This allows the actor to divide attention into smaller parts and apply it accordingly.

Although the fourth wall was established with realistic and naturalistic theatre, it can also be used in other dramatic styles. According to actor and director Lee Strasberg's notes about the Group Theatre, "the audience can forget where they are and be transported to the imaginary place of the play, a place that doesn't have to be purely realistic" [Cohen 2010: 7]. Thus, it is possible to create the imaginary fourth wall in circumstances that do not necessarily try to represent life or realistic places. Regarding this, the fourth wall is more about activating the performers' and audience's imagination to transform the circumstances given by the theatre venue or space.

2. The need to break the fourth wall

While Konstantin Stanislavski emphasized the importance of the fourth wall in acting, the German director, dramatist, and writer **Bertolt Brecht** criticized both the aesthetics of illusion and truthfulness as well as the dominant dramatic style in the theatre, calling for the demolition of the fourth wall. Brecht argued that the theatre spectator sitting at the imaginary keyhole is as real as the fact that the same spectators are sitting in the theatre. Therefore, the spectator's presence cannot be forgotten, and there is no need for a "secret agreement" between the performer and the spectator. With this appeal, Brecht did not seek to put the audience in an uncomfortable situation but rather to activate their thinking, especially their sense of criticism [Brecht 1972: 84–85]. According to Brecht, to break the imaginary fourth wall, the alienation effect (*Verfremdungseffekt*) or V-effect should be used, "a technique of taking the human social incidents to be portrayed and labelling them as something striking, something that calls for explanation, is not to be taken for granted, not just natural" [Willett 1964: 125]. To Brecht, it is through alienation that an effect is achieved that ignores the creation of the illusion or breaks it, preventing the viewer from settling into the reality of the performance.

The boundaries were also discussed by several other thinkers, including **Antonin Artaud**, in whose approach the direct connection between the viewer and the actor should be restored. To do this, the viewer should be placed at the centre of the performance, in other words: ignore the fourth wall and abandon the conventions of traditional theatre. "We abolish the stage and the auditorium and replace them by a single site, without partition or barrier of any kind, which will become the theater of the action." [Artaud 1958: 96]

In turn, the ideas of Brecht and Artaud inspired other prominent theatre theorists and practitioners of the 20th century, who began to rethink the relationship between performer and spectator. For example, Polish director, theatre theoretician, and innovator **Jerzy Grotowski** shifted the boundaries between performer and spectator, arguing that to overcome the separation of stage and auditorium, the actor's play must incorporate the spectator into the action, resulting in a secular ritual in which actor and spectator participate together [Grotowski 2002: 74–78]. The English director **Peter Brook**, in *The Empty Space*, discusses Bertolt Brecht's ideas, including enchantment and illusion, and, like Brecht, stresses that the breaking of the fourth wall is not intended to make the audience uncomfortable or to bully them, but to activate them. However, Brook does not agree that the opposite of the illusion created by the fourth wall is reality, since illusions exist everywhere, in the theatre as well as in real life [Brook 1972: 64–70].

The idea of breaking the fourth wall also inspired the Brazilian theatre theorist and practitioner **Augusto Boal**, who compared Brecht's alienation effect with the chorus from the ancient Greek theatre, and noted that the boundary line separating the spectator from the performer, which Brecht wanted to break with enchantment, nevertheless remains. The reason, according to Boal, lies in the power relationship between the performer and the spectator, in which the performer is the dominant party even when the fourth wall is seemingly broken down, which in turn oppresses the spectator. Even if the performer would like to enter into dialogue with the spectator, he or she is hampered by the limits of one's role and the boundaries of the stage [Boal 2008: 19–21].

There are also opinions among theorists and practitioners, according to which the breaking of the fourth wall is seen as a technique already used before the establishment of the convention of the fourth wall. Although addressing the audience and using metatheatrical elements date back to the earliest forms of theatre, it can be problematic to consider these examples as attempts to break the fourth wall. While the chorus in Greek theatre would "often stand up for their particular role; promote their playwright and indulge in literary polemic; attack current political targets; advise, and sometimes abuse, the audience" [Taplin 1995: 36], it is important to stress that using these methods was a conventional practice of Greek theatre. Consequently, whereas one can find similarities between the Greek chorus and Brecht's alienation effect, it is also crucial to acknowledge the norms within the social and historical contexts. While Brecht wanted to break the established norms, the chorus in Greek theatre followed them.

Playwright and theatre director Dario Fo also claimed: "The intention of doing away with the idea of the fourth wall was already an obsession with the Commedia players." [Fo 1991: 73] He stated that breaking the fourth wall was a central intention

by Italian actors, which Molière gained in Commedia circles. Renewing the French theatre, Molière "grasped the importance of the involvement, including the physical involvement, of the spectators" [Fo 1991: 73]. However, Oliver Double challenges Fo's assumption that the origins of the fourth wall go that deep into history, suggesting that this error might have come from a quote mistakenly attributed to Molière. According to Double, it is actually Molière, the character, in Jean Cocteau's play called *L'Impromptu du Palais-Royal,* who is wondering "whether this invisible fourth wall does not conceal a crowd observing us" [Double 2017: 9]. Although Molière, the playwright, would have wished to challenge the prevailing norms in French theatre, the convention of the fourth wall was not one of them.

Likewise, the elements from William Shakespeare's plays are sometimes considered as an attempt to break the fourth wall. Jordan Schroeder gives an example from Shakespeare's play *A Midsummer Night's Dream*, where Puck turns to the audience and informs that if the audience was offended by the play they saw, they could imagine that they were only dreaming. Although Schroeder suggests that Shakespeare "dabbled in breaking the fourth wall as well" [Schroeder 2016: 12], breaking the non-existent fourth wall was not the author's intention. Since the audience's presence was acknowledged throughout the theatrical performance during the Shakespearean era, the concept of the fourth wall did not exist – neither in the theatre nor within the fictional space. Therefore, the act or attempt of breaking the fourth wall can only be identified within the context where the convention of the fourth wall has been established.

3. Classification

With the growing use of diverse strategies in dramatic productions, including the reinterpretation of classic works, the landscape of contemporary theatre has become more multifaceted than ever. Estonian contemporary theatre, among others, continues to explore the boundary between performer and spectator, actively seeking to redefine their roles. Building on the literary conclusions drawn, this study aims to propose a potential classification of various methods of breaking the fourth wall, illustrated through examples from contemporary Estonian theatre.

3.1. The performer/character breaks the fourth wall

The performer/character is aware of the audience's presence and addresses the audience with a **gaze**, **verbally**, **physically**, and/or **entering the audience space**.

The power of breaking the fourth wall can often lie in the **gaze** of the performer/actor, without always being accompanied by a verbal turn. The eye contact achieved between the performer and the spectator combines and tests the boundaries of the fictional and the real world. The gaze often makes the viewer question whether

it is the performer or a character who is looking, which is why the gaze often causes the spectator to feel awkward or confused. In a social situation, the gaze can convey necessary information, such as the intention to make contact with the interlocutor [Bishop, Cancino-Chacón, Goebl 2019: 73]. Thus, this conclusion is also relevant in the theatrical situation, where the performer glances towards the spectator.

However, not every gaze towards the audience is automatically a fourth wall break. An example from film studies is relevant here, as characters often look directly into the camera. While the fourth wall can be seen as a camera or screen that separates two realities, Tom Brown describes the breaking of the fourth wall as a situation in which a character becomes aware of the viewer's presence. It is important to emphasize that breaking the fourth wall is not considered to be the use of a point-of-view shot if the purpose of the shot is to show what is happening, for example, from the point of view of another character [Brown 2012: 10–11]. Just as a glance into the camera does not always mean breaking the fourth wall, neither does every gaze into the auditorium serve such a function, as the character might look into the audience and, for example, describe a certain landscape he/she sees.

Thus, breaking the fourth wall is often understood as addressing and/or **verbally** speaking to the audience, where the addressor can be both a character and a performer who has stopped impersonating the character. Depending on the context of the production, the spectator's role can also vary. There is also a difference in whether the performer turns to the audience as if they were given a role that is included in the play, so the spectators are placed into the fictional reality, or being addressed as the audience of the show and not part of the fictional reality. Often, the addressee is supposed to speak or act a certain way by answering a question. At the beginning of *Terror* [Vanemuine 2021], the audience is assigned the role of a jury in a fictional courtroom and instructed to attentively follow the evidence, as they will ultimately determine the verdict at the end of each performance. Since it is relatively rare for audiences to be assigned a decision-making role, this approach enhances their sense of responsibility and attentiveness.

Crossing the **physical boundary** between the stage area and the auditorium is becoming more common in contemporary theatre – for example, it is not uncommon for the performer to use the same doors and aisles as the audience to enter the hall. In most cases, this breaking of the fourth wall is characteristic of so-called traditional theatre halls, where the stage and audience space are distinguishable from each other. However, in modern theatre, even more different ways to enter the audience space and cross the invisible border are found. In Tiit Ojasoo's production *Brother Antigone, Mother Oedipus* (Estonian Drama Theatre, 2022), the imaginary dividing line between the stage and the hall is broken throughout the performance, when the performers climb over the seats on the ground floor of the auditorium. By crossing

the physical boundary, climbing over the seat rows and breaking the fourth wall, the characters of *Brother Antigone, Mother Oedipus* automatically become outcasts of the society or face death and are no longer seen by the audience. As the performers reach out their hands to leave the space through the back door, the audience members who help the character to finish her/his mission automatically become accomplices in the expulsion or the character's suicide.

There are other examples: in Antti Mikkola's modern adaptation of *Macbeth* (Tallinn City Theatre, 2017), the performers delicately entered the Hell Stage auditorium before the performance began and initially impersonated ordinary spectators. To engage in an ongoing meeting on stage, the performers suddenly rose from their seats and stepped onto the stage to join the others. This approach suggests that the audience, too, becomes immersed in the illusion, participating in the meeting and assuming the role of other union members. As in both examples, an imaginary boundary between the stage and the hall can be drawn, crossing the imaginary line had the effect of breaking the fourth wall and abandoning the conventional boundaries.

Physically entering the audience space can also mean physically influencing the viewer in another way, as a result of which the viewer has to perform a task given by the performer – for example, go on stage or hold a prop handed to her/him by the actor. In *Ejection or the Chronicle of an Apple* (Estonian Drama Theatre, 2016), the main character makes eye contact with an audience member sitting in the first row and then throws him/her the apple. Although the character has already broken the fourth wall with a gaze, this act comes as a surprise for the viewers and crosses another level of the conventional boundary. The act of throwing the apple serves as a signal to the audience, emphasizing that they are not merely an anonymous crowd but active participants who should remain attentive throughout the performance.

3.2. Alienation

The alienation's idea is to distance the audience from emotional involvement in the play through jolting reminders of the artificiality of the theatrical performance [The Editors of Encyclopaedia Britannica 2019]. This might usually happen in two ways: when the actors are changing their acting strategies and distancing themselves from the character (1), or by using theatrical tools to break the theatrical illusion (2).

According to Luule Epner, the strategies of acting in contemporary theatre could be divided into three groups: *being someone else*, *being oneself*, and *performing actions* [Epner 2014: 20]. When the strategy of acting changes, it could also lead to breaking the fourth wall. In *I Don't Believe* [Von Krahl 2024], the actors were already on the stage when spectators entered the room. While having a spontaneous conversation with the audience attendants, and watching spectators while they were searching for

their seats, the illusion of fictional reality was difficult to form. However, during the performance, the actors switched from impersonating a fictional character to being themselves and then back to being someone else multiple times, like they were changing from Stanislavski's large circle of attention into a smaller one. While some of the actors were being someone else, others were performing several actions on stage, such as changing the set or moving the buffoonery. By breaking the conventional performing methods, for example, using several acting techniques during the same performance, the fourth wall convention could be broken.

However, it is not always the actor who breaks the fourth wall. The illusion of a fictional reality and/or the embodiment of a character created in the stage space can also be disrupted by theatrical tools of the production. As the purpose of alienation is often to distract the audience from absorbing the theatrical illusion, raising the stage axes, lighting up a darkened auditorium, or refraining from hiding what is happening on stage during a scene change can break the fourth wall in theatre. Bertolt Brecht's "alienation effect" represented a similar aim. In *Business as Usual* (Estonian Drama Theatre, 2024), the actors on stage are constantly being followed by two cameramen. While moving around actors, a live video recording is shown on the big screen on top of the stage. So, the audience could see two types of performances at once: first, what is happening on the big screen, and second, on the stage. Although the actors do not change their acting styles, seeing the video production staff moving around the stage while filming every scene creates an alienating effect.

3.3. The audience breaks the wall

Thinking about the diminishing effect of the shock effect of the fourth wall breaking down over time, one could also think of a situation in contemporary theatre where the conventional boundary between performer and spectator is broken down before the illusion of a fourth wall is even established. According to theatre scholar Hans-Thies Lehmann, in postdramatic theatre, the focus is redirected towards the spectator, who also perceives himself as having a different role to play in the theatre. With this fundamental change, theatre becomes a social situation, no longer an object of spectatorship [Lehmann 2006: 106–107]. So, as the fourth wall is a mutual agreement between performers and their audience, there might not always be a mutual understanding of how the wall should be "held up" during the performance.

In the context of breaking the fourth wall, less attention has been paid to the fact that tacitly agreed-upon rules, including the invisible wall, can be intentionally or unintentionally broken by the audience. This prevents performers from establishing or maintaining the established fourth wall. Today, the audience has been used to playing the conventional role of a consumer which usually means sitting anonymously

and quietly in the dark and not commenting on what is happening on stage [Heim 2016: 132]. However, one can easily point out several situations where the audience member intentionally or unintentionally breaks the fourth wall, whether by the light or sound coming from smartphones, comments about what is happening on stage, or leaving the auditorium during the show. As the convention of the fourth wall is still dominating, theatre etiquette is being less and less dictated from the stage. As Caroline Heim describes, the collective presence of the audience holds significant power, often prompting the fourth wall to be broken from the other side of the imaginary boundary [Heim 2016: 114]. By distracting the performance, the audience abandons the conventional rules and theatre etiquette.

However, the audience can also break the fourth wall by having the role of a participant. In Eduard Tee's production *Their Son* (Estonian Academy of Music and Theatre, 2024), when buying a ticket to the performance, the audience had to make a choice: while "the observer ticket" allowed the spectator to sit behind the fourth wall, the buyers of "the participant ticket" sat on the stage behind the table with the actors and were well-aware of the fact that they are participating in the performance. So, the participatory element or "role" did not come as an unpleasant surprise, allowing the stage reality and the fictional world to blend and softly break the fourth wall. As the breaking of the fourth wall has its psychological challenges and possible risks, making the audience aware of their participatory role reduced the stress and fear of participation among the audience members who had decided to stay in an observatory role.

The audience members who had bought the participant ticket were more willing to engage in spontaneous conversations with the actors. As the Estonian theatre audience tends to follow the conventional rules and often doesn't want to participate, it often leads to ignoring the actor who is speaking or trying to make eye contact. Being previously informed about the participatory element worked as a risk-reducing factor for all of the members, including actors who rely on the participant members of the audience. By changing the role of the audience, theatre can break the invisible barriers between the actors and spectators.

Conclusions

Contemporary theatre encompasses a wide range of styles and forms, making it difficult to imagine a spectator who has never encountered some form of fourth wall breaking. While there are many ways to challenge the traditional norms in theatre, breaking the fourth wall does not serve as shocking effect in the 21st century as it did before. In fact, one could argue that, despite the enduring strength of the convention, the unbreakable fourth wall has become increasingly rare.

This research proposed a possible classification of breaking the fourth wall in theatre. First, two layers of the fourth wall are being distinguished: an invisible boundary that exists in the theatre space and a second layer that exists in the fictional space. This is followed by a historical overview of the establishment of the fourth wall and the breaking of the fourth wall. By giving different examples from Estonian contemporary theatre, three methods of breaking the fourth wall are introduced: the performer breaks the wall, the alienation, and the audience breaks the wall.

Although there are many ways to break or test fictional or physical boundaries in theatre, the complex power dynamics between performers and spectators shapes the majority of theatrical performances. Performers typically hold power over the audience and dictate the events, leaving the question of whether it is truly possible to dismantle all the perceptible boundaries within a theatrical context unanswered. This issue is not merely about communication and the roles conventionally assigned to performers and spectators, but also the social and historical norms, and the willingness to break out of them to experience or learn something new. While theatre often provides a safe space to question societal norms, audiences may resist breaking established boundaries or abandoning their conventional roles. Therefore, it is important to understand the possible purpose and impact of breaking the fourth wall in theatre.

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