

## HISTORY, ARCHAEOLOGY & ANTHROPOLOGY

Religions as Intangible  
Heritage in Feuerbach

Technology and Otherness:  
Postcolonial Perspectives...

Closure Practices in Ravne  
and Göbekli Tepe

Altai-Tarbagatai in the 13th-  
14th Centuries

Discovering Thoughts, Inventing Future

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The Global Journal of Human-Social Science (GJHSS) is pleased to present this issue, bringing together a curated collection of high-quality research papers that explore diverse dimensions of human society, culture, and the social world.

This issue features research spanning topics including arts & humanities, sociology, history, anthropology, economics, political science, linguistics, education, and interdisciplinary social inquiry. Each paper has undergone a rigorous double-blind peer-review process to ensure scholarly rigor and originality.

We would like to express our sincere gratitude to the authors for entrusting their research with us, to the reviewers for their thorough and constructive evaluations, and to our readers for their continued engagement with the academic discourse.

We hope that the research presented herein inspires further inquiry and contributes meaningfully to the advancement of knowledge in the human and social sciences.

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## Religions as Intangible Cultural Heritage of Humanity in Ludwig Feuerbach

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### Abstract

Comparative research applying the genetic-critical method with which Ludwig Feuerbach (1804-1872) analysed Catholicism (1841) and Protestantism (1844), among other religions not yet addressed by Feuerbach. For this purpose, the author examines other religions that are currently global: Vedic (or Brahmanic), Orthodox (Christian), Jewish (Hebrew), Muslim (Islamic), Buddhist, Spiritist (Kardecist), traditional African or diasporic, Taoist, Jainist, Confucian, Mormon, Shintoist, Wiccan, and Masonic (whose religious characteristic is postulated, despite being denied by the institution). Each of these is considered an intangible cultural heritage through which human identity has been historically objectified and can be assumed contemporaneously as they are interpreted according to Feuerbach's proposal. Exposing their humanistic and naturalistic vocations contributes to humanity becoming a future community of planetary destiny, because it is rooted in its identity diversity and preferential partnerships with nature in its historical development as we advance.

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Ludwig Feuerbach

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## Abstract

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**Keywords:** *Religions, Ludwig Feuerbach, Anthropology of Religion, Historical Process, Cultural Diversity*

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## 1. Introduction: Human Self-objectification through religious historicity

“

[...] religion is a solemn revelation of man's hidden treasures, the confession of his innermost thoughts, the public manifestation of his secrets of love. [...] that is why religion precedes philosophy everywhere, both in the history of humanity and in the history of the individual. Man first transports his essence outside himself before finding it within himself. [...] The historical progression of religions is simply that what was considered by older religions to be objective is now considered subjective [...] it is now known to be human. Earlier religion is idolatry to later religion: man worshipped his own essence. Man objectified himself, but did not recognise the object as his essence; the later religion takes this step; all progress in religion is, therefore, a deeper knowledge of oneself. [...] But in return, the thinker contemplates the essence of religion hidden from itself, for which religion is an object, which it cannot be for itself.

Until now, every known society has adopted some form of religion as a coherent set of rituals for relating to beings that were originally superhuman. Evidence of this can be found even where cultural traces are scarce, in the ritual disposal of corpses, devotional paintings or manufactured divine objects (Johnson, 1982), and magnificent buildings (UNESCO, 2025) that reveal religious influences predating agricultural activities, which

surprised the current archaeological assumption that agriculture preceded religions (Childe, 1960).

According to Ludwig Feuerbach (1804-1872),<sup>1</sup> human history itself is religious, as religions notoriously transitioned from characteristically naturalistic (deifying aspects of inhuman nature) to polytheistic, whose profusion of deities reached a maximum, from that point they were reduced or at least began to highlight some among their religious pantheon, until they narrowed or were replaced by an increasingly comprehensive deity, even superior to nature, such as that of the Abrahamic tradition (mainly since its inflection by Christians), making the word (replacing the image that predominated in other traditions) a religious characteristic corresponding to a completely abstract single deity. With the same notoriety, this religious evolution was *pari passu* with population changes within their territorial boundaries, in other words transitioning from patriarchal to despotic political regimes and from these to constitutional monarchies. Religions would express the sparse collective self-awareness of populations about their social configurations in general, including political ones, which remain partially unconscious as long as they do not yet perceive human unity or the nature to which they belong as unitary (Feuerbach, 2009, p. 165–170).

<sup>1</sup>Excerpt from Feuerbach (2022, p. 52–53) work: “*A essência do Cristianismo*” (The essence of Christianity).

For this reason, Feuerbach's reflections<sup>2</sup> have always been influenced, at least to some extent, by criticism of theologies in general, but with the aim to identify ethical values in religions that both religious and atheist people could recognise as inherently human among themselves and with indistinct nature, whereby humanity would become a community as conscious of its unlimited communal vocation as it is deliberately preferential of alliances with the nature on which it depends. These are themes directly addressed in his texts (indirectly in all others) *Thoughts on Death and Immortality* (1830), *The Essence of Christianity* (1841), *The Essence of Faith According to Luther* (1844), *The Essence of Religion* (1846), *The Question of Immortality from the standpoint of Anthropology* (1847), *Lectures on the Essence of Religions* (1851), *Theogony according to the Sources of Classical, Hebrew and Christian Antiquity* (1857), *Spiritualism and Materialism: Especially in Relation to the Freedom of the Will* (1866), *On Moral Philosophy* (1868), and even in the letter he sent to his professor Hegel in 1828, from whom he had studied philosophy but questioned his claim that history would be concluded by Christianity (Feuerbach *apud*. Serrão, 2019).

For the study of religions, he formulated the genetic-critical method, in which any phenomenon must be understood by detecting its origins, whether as causes or merely as bases for its phenomenal configuration. This methodology was first applied to the Catholic and Protestant branches of Christianity, as they defined Feuerbach's own European historical context. Feuerbach thoroughly analysed both religions, in which he found the fundamental conflict to be resolved by humanity in the future: the medieval conflict because of Catholic community belonging without individuality versus the modern conflict because of Protestant non-community individuality (Feuerbach, 1974; 1967a, p. 21–31). This will only be settled, by the human community without any exclusion of human beings connected through artistic, scientific, and democratic cultural intermediaries between themselves and with nature (Feuerbach, 2008, p. 70–73).

The unity of humans and humanity with nature is commonly proclaimed by religions, each in its own doctrinal manner and with greater or lesser emphasis on one or the other of the two realities in which we live. This is also evident in human sensitivity itself, unlike its counterpart in other creatures, which is the only one diffuse to the point that our senses simultaneously think and are not limited to specific environmental focuses. As opposed to other terrestrial beings, as immediately as repeatedly, our sensitivity (*Sinnlichkeit*) formulates thoughts through feelings with senses whose mere inherently human exercise refers immediately to the dual objective belonging to humanity and nature as indisputably unified realities (Feuerbach, 2008).

Therefore, any deities can be perceived, as long as there is human candour, as possessors of the qualities most valued by the populations that generate religions, such as theological doctrines fine-tuned to their objective needs (*bedürfnis*), as historically compelling as they are mutable. Throughout the course of historical religious changes, however, Feuerbach highlights Christianity as being the religious and therefore historical moment in which it spread from enslaved people in ancient Rome to its imperial adoption, and also through the population centres that emerged with the fall of Rome, endowing us with the essential human quality of love that distinguishes us from other creatures governed solely by instinct (Feuerbach, 2022, p. 93–120).

While plant sensitivity detects water where its roots extend into the soil or sunlight where its leaves extend to absorb it, animal sensitivity focuses on mortal dangers or essential food sources in the surrounding environment. However, human sensitivity spreads, attached to nothing within or without, making us susceptible to a myriad of environmental elements to the extent that human instincts are unable to provide adequate individual guidance. This results in the incessant formulation, during our individual existence, of beneficial desires directed toward objects outside ourselves or within us: respectively, aiming to exercise love or self-love that drives us forward (Feuerbach, 2008, p. 54–56).

Essentially, being human means acting with compassion toward the unknown, whether it means love for another being (not only human), a thing, or even a certain activity toward which one is willing to direct one's life; or being compassionate toward oneself, ranging from vital self-preservation to social self-advancement. Love is the human foundation upon which all other sensations - intrinsically as emotional as they are rational - form and dissolve, because love arises from every human being's objective need to connect (or reconnect) with the differences they require to fulfil themselves, since these differences are found both in other human beings and in non-human nature. Through self-love, we consume beings and things different from ourselves, and through love we give ourselves and we are consumed by beings, things, or activities, which always belong to humanity or nature, loving in both directions (Feuerbach, 2008, p. 61, 65–66).

Feuerbach considers the global spread of Christianity to be historically positive as the self-objectification of love, as it is directed toward communal life by Catholicism and toward individualized life by Protestantism, although not fully corresponding to its historical importance: Catholics resist the erotic dimension, reducing sexuality to procreation, and Protestants resist the communal dimension of individuality, often opposing the science that flows from it. Each found what was missing in the other: Catholic love without individual pleasures, though with many communal aspects, and Protestant self-love without social progress, though individually stimulating (Feuerbach, 1967a, p. 21–31).

Non-Christian ancient religions are discussed throughout the text accompanied by Feuerbach's comments. Although Feuerbach wrote only one book (Feuerbach, 1857) comparing the Jewish, Hindu, and ancient Greek (Olympian) religions, he commented on other non-Christian religions. The method is being applied by considering the current expression of these religions in today's world and their global reach.

While acknowledging their human significance, such Christian traditions fragmented love without endowing it with the self-aware plenitude indispensable to the necessary human community in nature as its preferred ally; yet both pointed to humanity's historical maturity to finally embrace its dual objective belonging (to the community and to nature) in the future:

- assuming love as morality because it is a human necessity: "If, therefore, the supreme principle of Christian morality states: 'Do good for god's sake,' [...] the supreme principle of morality grounded in humanity states: 'Do good for humanity's sake'" (Feuerbach, 1967b, p. 375).
- assuming nature as a preferred ally because it is fundamental to the historical human condition: "Man owes his existence not to the first causes, from which everything proceeds, but to the ultimate causes closest to him; he owes his existence not to the earth as it once was, but to the earth as it is" (Feuerbach, 1967c, p. 7-8).

<sup>2</sup>Through his study of religions, Feuerbach explored various topics, some of which are still relevant today (Lopes, 2025a).

## 2. Love as human sense in other global Religions

Although some religions, outside the Christian tradition, were studied by Feuerbach, who even offered significant theological insights into them, it was only to the main branches of Christianity that he systematically applied his genetic-critical method, revealing the prosaic love underlying Catholic sacraments and the specific cult of Mary, as well as self-love underlying Luther's reformist themes (Feuerbach, 2022; 1967b).

Given the limitations of length in a scholarly article and looking forward to survey contemporary religions with a global reach regardless of the number of followers this analysis will focus on certain rites or doctrinal formulations within them. Nevertheless, this work relies on the earlier Feuerbachian thesis that Christian doctrine emphasises love as an alienated human attribute, although still limited in its human dimensions, yet its variable presence within them allows us to establish its fundamental human meaning as a characteristic of humanity whose self-objectification was historically and objectively necessary. Moreover, even in extinct and predominantly warlike religions - widespread and predating the emergence of Christianity - love for others held some prominence, as seen in the Orphic interpretation of the Olympian (Greco-Roman) pantheon or in the resurrection of the divine Baldur and his wife following the demise of the Norse (Asgardian) pantheon.<sup>3</sup>

The genetic-critical approach, which will henceforth be adopted in the analysis of the following religions with a global scope, as mapped by region in the World Religion Database in September 2025 (Mapscaping, 2025). Therefore, the focus is on identifying the primary traditional function of love, according to the Feuerbachian perspective of the benevolent human will directed toward an external or internal object - be it a being, a thing, or an activity - provided that it is determined by one's subjective affection. To this end, we will examine - though not exhaustively - religions that are no longer confined to the territory or population group in which they originated: Indian Vedism (or Brahmanism), Orthodox Catholicism, Chinese Taoism and Confucianism, Indian Jainism, Japanese Shintoism, Hebrew Judaism, Asian Buddhism, Muslim Islam, Kardecist Spiritism, Wicca, and African religions (both traditional and diasporic). I also include Freemasonry, whose religious orientation I will postulate, despite its denial of a religious character and due to its well-known global reach (The Grand Lodge of Ohio, 2026). Still, I do not include others such as Sikhism, which remains largely confined to its place of origin, or the Bahá'í Faith due to its Islamic alignment, even though both have millions of followers.

### 2.1. From love to nature (Vedic, Taoist, Jain, Shinto, and Wiccan)

Throughout history, the perception of nature - as part of the dual reality (natural and communal) that constitutes humanity - has preceded even that of human unity, while its distinction as something inhuman or separate from us is immediately and repeatedly grasped by our sensibility. That's the reason why the earliest religions perceived natural phenomena as endowed with personalities with whom we could communicate, thereby

appeasing our fear; yet this does not fully explain religion in general, since such phenomena remained significant during periods of religious polytheism, even as the profusion of deities became contained within a hierarchical pantheon. Such religious formulations arose among sedentary human communities and, therefore, no longer subject to nature once it became minimally predictable through agriculture and animal husbandry. Their devaluation by later monotheisms, which conceived them as mere creations of a being as unique as the one who bestowed them upon humanity, led to increasing human arbitrary treatment of inhuman nature. Feuerbach defined the religious sentiment, throughout its historically variable expression, as a dependence on nature in general due to a diffuse sensibility within us (Feuerbach, 1967c).

The anthropocentric approach of supposed human superiority over nature corresponds to a divine father figure, whose creative omnipotence would justify racist, colonialist, ecological, and even sexist abuses, since these merely express humanity's likeness to the arbitrary creator of the world: "I have complete ownership only of what I produce, of what I make. Only rights of authorship are followed by property rights. My son is mine, because I am his father." (Feuerbach, 1967c, p. 49).

The rise of Judeo-Christian monotheism emphasised the anthropocentric tradition, already present in earlier Greco-Roman polytheism, whose Olympian pantheon linked its deities to their respective peoples, thereby establishing in the West, more than in other parts of the world, the anthropocentric bias regarding nature to hypocritically deny the continuity of the sense of dependence on it: "Need is, therefore, god-fearing, humble, religious, but enjoyment is proud, god-forgetful, irreverent, frivolous" (Feuerbach, 1967c, p. 32). His omnipresence in the environment was not denied by the East: "How can one explain that the East does not have a history as vivid and lively as that of the West? Because in the East, man does not forget nature for the sake of man; he does not forget, for the sake of the splendor of the human eye, the splendor of the stars and precious stones [...]. Compared to the Westerner, the Easterner is in the same position as a country dweller is to a city dweller. The former depends on nature, the latter on man; the former is guided by the barometer's readings, the latter by the stock market's fluctuations; the former, by the signs of the zodiac, which remain ever constant; the latter, by the ever-changing signs of honor, fashion, and public opinion" (Feuerbach, 1967c, p. 46).

In the following religions - which are naturalistic in the Feuerbachian understanding of nature as a central religious aspect (Feuerbach, 2009, p. 102) we will examine how love of nature generally serves as a foundational element:

- In the Vedic religion (founded on the four ancient *Vedas*) or Hinduism, as it is commonly known in the West, the inhuman nature is loved because it prescribes vegetarianism as the preferred dietary choice, or supports an ovo-lacto-vegetarian diet; the protection of the cow in its daily physical well-being; purely animal deities such as the monkey *Hanuman* or partially elephant-like figures such as *Ganesha*, among the principal deities of its innumerable pantheon; the final ritual phases of retreat to the forest and renunciation of family life (following a period of studious youthful asceticism and a patriarchal life with grandchildren) by the closest caste (*Brahmins*) to subjective reintegration into the universal core of nature or *Brahman*, during their next post-mortem rebirth according to the traditional hierarchy of the Indian population (Johnson, 1960, p. 103–127; Bulfinch, 2004, p. 303–307; Vallet, 2001, p. 135–143). Traditional yoga (union) exercises are

<sup>3</sup>The loving will of the mortal Orpheus enabled him to seek out his wife Eurydice in the underworld of the dead (Hades), influencing the deities and entities active there, just as the divine Baldur the Good returns from his death - brought about by the schemes of the envious god of deceit (Loki) and with his wife from the realm of the dead without a struggle (Hella), to restore the Universe shattered by the battles (Ragnarok) between the gods and their enemies. The principal Greco-Roman and Norse deities were located, together and respectively, on the Greek Mount Olympus and in Asgard, at the end of a rainbow bridge (Bulfinch, 2004, p. 183–186, 328–330).

ostensibly available means for the progressive merging of individuality into the universal substrate of natural existence: “Just as the man who has scaled the cliff sees those who are [...] on the plain, even so the man [...] who has risen to the calm [...] of insight [...] contemplates all creatures” (Patanjali *apud*. Johnson, 1960, p. 107–108).

- In the Taoist religion, where the totality of existence is conceived as the *Tao* (the Way) encompassing both natural laws and the hierarchy among deities - becoming one with the universe is the goal of its most important rites (all notably cosmic), including the solitary practices of individual psychophysical alchemy, and even guiding its ancient arts of *Tai Ji Quan* and *Feng Shui* toward physical and spatial adjustments (Granet, 1968, p. 314–315; Irwin, 2004; Chuang Tzu, 1964, p. 112–113). “Noble is the one who surrenders his body to the world. To him the world can surrender itself. He who loves makes the world his body. In him the world can place its trust” (Lao Tzu, 1999, p. 38–39).
- In the religion of Jainism, the nonviolence prescribed by the founder Jina (meaning “conqueror of passions”) extends to the well-being of all animals, including even the tiniest insects, as required by the 24 deities (*tirthankaras*, including Jina himself) who serve as bridges for the faithful’s individual spiritual journeys after death. Through twelve levels of intensifying asceticism, they progress from fasting to ultimate starvation sometimes, offering their lives for the benefit of other beings, including plants. It is these degrees of asceticism toward natural creatures that distinguish the 88 religious sects of Jainism (Vallet, 2001, p. 149, 152, 158, 161, 163–164).
- In the Shinto religion, a myriad of Japanese deities form a polytheistic system that is currently closer to animism, as the vast majority of them correspond directly to aspects of the inhuman nature. Although limited to the Japanese population, its divine worship of natural environmental elements - as naturally superhuman beings (*Kami*) and often confined to their territorial scope - implies a distinct human devotion to nature: all members of the mineral, plant, or animal kingdoms can be enshrined, in addition to waters, mountains, and even the fire of immortal deification. The traditional construction of *torii* gates near the sites where such natural elements are found highlights the Shinto objective of transition from the human to the distinct natural realm (Vallet, 2001, p. 270, 271, 273, 279).
- In the Wiccan religion - or Wicca, rooted in European “pagan” or naturalist (pre-Christian) traditions and formulated in the 1950s by Gerald Garner (1884–1964) - the earth, moon, sun, forests, and animals are conceived as encompassing deities, feminine and masculine, respectively. In ancient Celtic matriarchal traditions, femininity is held as a constant divine principle that embraces, rather than disregards, a masculinity defined by its cycle of decay and rebirth after each fertilization. Their followers (gathered in covens) celebrate more than 10 natural cycles (lunar and seasonal) throughout the year and perform, in solitude, rituals of natural magic involving the elements of air, earth, fire, and water through herbs, other plants, crystals, and stones, recording them in a personal journal (Book of Shadows). Wiccans are reincarnationists, they envision a Summerland as a privileged spiritual habitat granted to deserving souls - a spiritual habitat where the

soul prepares for its eventual return to the physical world (Buckland, 2003).

## 2.2. From love to family (Orthodox, Jewish, Confucian, Muslim, and Mormon)

Since our lives are received from other human lives, the family continuum - primarily from ancestors to descendants, but also horizontally - highlights why it unites both fundamental aspects of humanity: the loving and the historical. It is the communal aspect of human unity that directly confers continuity upon it by making individuals part of it from the moment of their birth. In and of itself, this communal need for collective memory implies that human beings are aware that only the living can provide a posthumous existence for the dead. Their burials - though framed by funeral rites asserting an afterlife - unconsciously affirm the necessity of the living representing the dead<sup>4</sup> (Feuerbach, 2023, p. 36–38).

While in polytheistic religions we encounter divine pantheons under male dominion, such as Odin in Asgard or *Yuan Shang Ti* in the Celestial Palace (Bullfinch, 2004, p. 313; Lao Tzu, 1999, p. 25), it is in the religions that are absolutely opposed to polytheism among those currently practiced globally that love for the family - by highlighting its patriarchs (especially when they are ancestors) - is structurally superior to other expressions of love, even though the family is important in various religions, due to the considerations of collective memory outlined above.

The love for the family foundation is structurally dominant:

- In the Jewish religion - whose Hebrew formulation was the first monotheistic one, historically established in opposition to polytheistic territorial enemies (primarily the Philistines) who worshipped local animal deities - a divine father, though of a nature akin to humanity, chose the Hebrews for his exclusive worship. By calling themselves the children of Israel - the name given to their common ancestor Jacob by the one god - the nominal element Ben (“son of”) in the male names of one of his twelve sons, from whom the respective confederated tribes descended, already attests to the patriarchal foundation of the Israelite community. Whenever a Hebrew leader, as an Israelite son, committed an act deemed reprehensible by the divine father, the Hebrew population was subjugated by a neighbouring people until his error was rectified. From this arose the religious notoriety historically attributed to King Solomon’s wisdom due to the unparalleled profusion of neighbouring queens and their respective offspring; and the ritual marking the entry of young people (*bar* and *bat mitzvah*) into the reading of ancestral laws, while religion is transmitted through the maternal womb (Vallet, 2001, p. 25, 28, 45).
- In the Orthodox (non-Roman Catholic) religion that emerged from the East-West Schism against Roman Catholicism in 1054, the third divine person (the Holy Spirit) in the Christian Trinity has been theologically interpreted as proceeding from the divine father, just as Christ proceeds from the father. This theological interpretation highlights the Christian paternal divinity within the divine Trinity, at least almost as much as its centrality during the creation of the world. From this

<sup>4</sup>The burial of the dead was adopted by *Homo sapiens* (and by our closest human relatives, *Homo neanderthalensis*) hundreds of thousands of years ago. Ritual practices began to formalize roughly 100,000 to 40,000 years ago, a time of profound symbolic expansion that anthropologists call the creative revolution (Neves, 2006, p. 275).

divine creativity, the other two divinities arise in communion with it, both playing roles that inspire humanity in the world created for it. The paternal predominance within the divine communion - as the second person or divine sonship does not give rise to the sacred spirit - expresses a patriarchal tendency evident from the traditional designation of its autocephalous institutional leaders as patriarchs of the Churches (Burgess, 1989), to the masculinity of the *Cossacks*, whose warrior role was traditionally exercised through the systematic repression of other religions (primarily Islamic and Catholic) and of social structures in general, wherever Christian Orthodox churches were found or were being built in the process, as their “warriors of the faith” - including under Tsarism (Plokhy, 2001).

- In Confucianism, through the teachings of the scholar Kung (Fu) Tzu (551–479 BCE), his philosophy responded to the traditional Taoist religious preference for nature in general by emphasizing a “Tao of Man,” which was as relevant as - or even more relevant than - the celestial or planetary Tao, and which did not involve the customary Chinese polytheism. For Confucius, education is an eminently paternal function, as the transmission of communal knowledge is a strictly disciplinary exercise to align the community - from the family to the political sphere - in the face of external natural processes. Whether through the predominant role of the eldest son in mortuary rites or the execution (and subsequent remembrance) of the control of the Yellow River’s course by the engineer Yu (entitled the Great), just as Confucius’s journey among the Chinese kingdoms was pedagogical during the widespread wartime period in which he taught (Cheng, 2008, p. 73–80): “A young man must be respectful: at home toward his parents, in society toward his elders. [...] And if he still has time to spare, he may devote it to learning culture” (Confucius *apud*. Cheng, 2008, p. 69).
- In the Muslim religion, its monotheistic formulation by Muhammad (570–632 CE), although referring to the same creator deity as both Judaism and Christianity, reacted to both religions with even greater aversion to any polytheistic tendencies, admitting within it no appreciation for femininity - not even the purely maternal aspect of the Christian Mary - nor any fragmentation of its divine aspects, such as the 99 Jewish names or the Christian Trinity. Islamic monotheism conceives the creation of the first man from a drop of semen from the one god, Allah, whose teachings are such that only men, as his sons, are entitled to either gratitude for obedience or ungrateful disobedience. Following his divine paternal example, Muslim customs (which are radically patriarchal) include male polygamy, mandatory veils for women, and flogging for adultery of both sexes. The historical corollary of its predominant doctrinal emphasis on paternity was the division between *Sunnis* and *Shiites* as the main religious branches, due to the founder having fathered only daughters: the *Shiite* minority follows the descendants of his cousin and son-in-law Ali, while the *Sunni* majority, characterized by continuous internal divisions, follows the descendants of two fathers-in-law or another son-in-law, stemming from a battle between those led by Ali and by Muhammad’s favorite wife (Aisha), among the 11 wives of the founder of Islam (Vallet, 2001, p. 94, 95, 98, 101, 104).

- In the Mormon religion formulated by Joseph Smith (1805–1844) in 1830 a theological critique of Christian traditions in general—the doctrine both rejects the concept of the Trinity and drives the expansion of its missionary organisation both within (the founding of Utah’s capital) and outside the United States. As Mormons conceive of the preservation of family ties in Christian celestial eternity, the patriarchal family structure is a precept so strongly emphasised that it led to male polygamy until 1890 (when it was banned by most Mormon churches, though still practiced by some), the bearing of as many children as possible in large families, strict community punishments for premarital sex or drug use, and also the baptism of the dead through their physical representation by descendants, as preparatory measures for a greater and better reception of Jesus Christ at his second (and imminent) apocalyptic coming to humanity (Parrish, 2000).

### 2.3. From love to oneself (Buddhist, Spiritist, Masonic, and traditional or diasporic African religions)

In the following four religious traditions, the universe is spiritualized as it is permeated by the movement of incorporeal spirits: *bodhisattvas*, spiritual communities, individual *post-mortem* lights, and divine spiritual guides.

They emphasise the observance, as living human beings, of the universal natural processes in their individual lives, without their spiritual evolution being enhanced, as through alchemical techniques (of Taoists) or special births (such as *Brahmins*), to attain Buddhist *Nirvana*, Spiritist purification, Masonic subjective righteousness, and direct communion with the African divinity inherent to their spiritual belonging.

As Feuerbach observed in his study of Lutheran thought, self-love - or love of one’s own self - as part of the loving nature intrinsic to humanity corresponds to the exercise of human sensibility. This sensibility, being widely diffused, also constitutes the very essence of the human being and enables it - just as it does any sentient being by virtue of its life, since even the most limited sensibility includes the self - to become the object of its own loving will. Feuerbach understood the Protestant self-objectification of this human aspect, which emphasises individualization in divine favor, as a fundamental historical shift within this Christian tradition (Feuerbach, 2019, p. 44–49; 1967b).

However, self-love also plays a central structural role in Buddhism, Spiritism (Kardecism), Freemasonry, and traditional or diaspora African religions, serving as a common thread among them, although with less emphasis on material prosperity than in Protestant Christianity:

- In the Buddhist religion as formulated by Siddhartha Gautama (563–483 BCE), the inevitability of the suffering inherent in natural life - arising from the cycle of birth, illness, aging, and death - requires individual training that enables human beings to practice systematic detachment and a subjective relativization of the importance attached to material possessions, through the practice of compassion toward oneself and others in the various aspects of universal life’s decline. Buddhism is divided between followers of one or more Buddhas (individuals whose subjectivity or soul has become immune to the illusions of desire, though not to desire itself) - whether fictional or historical; believers in the attainment of the spiritual state of Buddhist subjectivity

by some or in the universal capacity to attain it after several successive incarnations, though Nichiren did so during an ordinary mortal life (Soka Gakkai, 2016, p. 26–28). But there is consensus on the need for mandalas as devotional objects, in addition to meditative techniques and *bodhisattvas* (souls close to becoming *buddhas*, who postpone their entry into *Nirvana*, as an immutable universal dimension) to aid the progress of other suffering souls (Bulfinch, 2004, p. 307–308). Feuerbach considered Buddhism to be an expression of an impulse toward happiness inherent in the human condition, but, like Botany and Chemistry, limited to its negative aspect of dealing with suffering, whereas its positive aspect - even through passions, provided they were all embraced in alignment with the subject's inner self - would make life blissful (Feuerbach, 2019, p. 52, 53, 89–90).

- In the Spiritist religion systematized by Hippolyte Rivail or Allan Kardec (1804–1869), in which incorporeal beings move freely throughout the universe and also interact with it when incarnated in bodies to which they impart intelligent life, they communicate with intelligent living beings while in a disembodied state - whether not yet reborn or residing in spiritual colonies of purer souls or spirits - self-love is distinguished by its internal charitable practices. All are therapies of the perispirit or fluidic link that prevails in the body while inhabited by the soul, and in which adherents considered mediumistic - due to their ability to communicate with spiritual realms (of souls more or less purified and, therefore, intelligent) - intervene in the emotional suffering of others, as individual purification is a constant inner transformation by the souls, incarnate or not, becoming more intelligent because intelligence is an attribute of the universal divinity from which they emanated (Kardec, 2009; 1954). Feuerbach vehemently criticised beliefs in immortal souls as a mere hypocritical denial of death and as something not inherent to humanity, since such beliefs had never been a source of joy in any historical context, even though the afterlife was proclaimed to be a life free from human limitations (Feuerbach, 2023, p. 35–36).
- In Freemasonry, although it has traditionally rejected the notion of being a religious organisation and places no restrictions on the individual religious beliefs of its members, membership is based on belief in a deity distinct from those worshipped in other religions—a deity who is said to have formulated universal natural laws, and whose internal veneration implies a brotherhood that is sectarian in nature and referred to as the Masonic brotherhood (The Grand Lodge of Ohio, 2026). I therefore consider it to be a religion as its internal collective rites, external individual relationships, and expressed values (Liberty, Equality, and Fraternity, for which Freemasons were politically active against absolute monarchies), at least since the 18th century, are grounded in the divine exemplification of the cosmic works of the Great Architect of the universe. Stemming from this universal dedication is a system of fraternal support that facilitates advancement through the Masonic degrees - apprentice, fellow craft, and master - while simultaneously informing the member's external life and professional duties. (Jacob, 2005).
- In traditional or diasporic African religions - originating, respectively, on the African continent or through the reintroduction of enslaved people outside of it - their various

forms, ranging from those with the strongest traditional continuity (such as *Vodum*, which is deeply rooted in the Caribbean) to the most innovative African-based traditions (such as *Candomblé* and *Umbanda* in Brazil), followers have their divine guides revealed by priests, in such way that they are both open to spiritual possession through dance (set to the rhythm of drums as sacred as the ground upon which they stand) and are otherwise assisted by the deities of their spiritual lineage (Johnson, 2015). Whether male or female, these deities constantly demand proof of love from those who belong to their spiritual lineage; they are, therefore, divine examples of the joyful self-love that should also govern human relationships, just as it does in the relationship between their divine guides (Santos, 2019, p. 6, 7, 241).

The table below classifies the religious orientations of the religions listed above, including the two already analysed by Feuerbach in 1841 (Catholic) and 1844 (Protestant):

**Table 1.** Contemporary global theistic orientations.

| Current Global Theisms | Monotheism                              | Polytheism                             | Pantheism | Animism | Deism                       | Shamanism |
|------------------------|-----------------------------------------|----------------------------------------|-----------|---------|-----------------------------|-----------|
| <b>Monotheism</b>      | Orthodox<br>Islamic<br>Jewish<br>Mormon |                                        |           |         |                             |           |
| <b>Polytheism</b>      | Roman<br>Catholic<br>Protestant         |                                        | Taoist    |         |                             |           |
| <b>Pantheism</b>       |                                         | Vedic                                  | Buddhist  | Jainist |                             | Wiccan    |
| <b>Animism</b>         |                                         | Shintoist                              |           |         | Confucianist<br>Freemasonry |           |
| <b>Deism</b>           |                                         |                                        |           |         | Spiritism<br>(Kardecist)    |           |
| <b>Shamanism</b>       |                                         | African<br>(continental and diasporic) |           |         |                             |           |

Source: Prepared by the author.

Among the 16 divinatory traditions - which are now global in scope, except for those of African origin or influence, of which there are dozens, and with Freemasonry not being classified as a religion - six can be classified as monotheistic (Jewish, Catholic, Orthodox, Muslim, all Protestant denominations, and Mormon), three as polytheistic (Vedic, Shinto, and those of African origin or matrix), two as pantheistic (Taoist and Buddhist), 1 animistic (Jainist), one as shamanistic (Wiccan), and three as deistic (Confucian, Freemasonry despite its rejection of religious connotations, and Kardecist Spiritism). However, some have hybrid theological characteristics, although one of them predominates, according to Feuerbachian definitions:

**Roman Catholicism and Protestantism:** Polytheistic monotheisms that adopt the Christian Trinity as a divine trinitarian equivalence in the composition of the one deity. In this system, the paternal and maternal deities are mediated by the spiritual deity, through which they are unified, despite being distinct; Feuerbach interpreted their multiple unity as the historical self-objectification of communal love (Catholic) and self-love (Protestant) as aspects of the intrinsic sense of love, but finally at least highlighted during religious evolution (Feuerbach, 2022, p. 111–115): “The Trinity was the supreme mystery [...]. But its secret [...] is the secret of common and social life - the secret of the need of the ‘you’ for the ‘I’ - the truth that no being [...] is, by

itself alone, a true, perfect, and absolute being, and that only the connection, the unity of beings of identical essence, constitutes truth and perfection” (Feuerbach, 2008, p. 74).

**Orthodox Catholicism, Islam, Judaism, and Mormonism** each represent distinct monotheisms: while Islam and Judaism proclaim a solitary deity, Orthodox and Mormon interpretations relativize the Trinity by positioning the Father as the ultimate foundation. As [Author] observes: “Here, only god is real, active, and a doer. Islam expressed this thought with all the energy and fervor of the Eastern imagination. [...] Or rather: this conception according to which everything could be other than it is, that there is no necessary nature of things, it is merely the consequence of the belief that god can do anything, that everything is possible for god, and that, consequently, no natural necessity stands before the will of god. [...] No image can be conceived of the Jewish god; but who can conceive of a corporeal image of the spirit, of the will, of the word?” (Feuerbach, 2009, p. 168-169, 216-217).

**Brahmanism or Vedism** (formerly known as Hinduism in the West): Pantheistic polytheism, in which a multitude of deities are immediately invoked, yet all consist of aspects of the undifferentiated *Brahman*, or some are avatars or incarnations of a component of the Vedic trinity (Brahma, Vishnu, or Shiva) in one of the *Yugas* or phases in which existence unfolds, generally already divine “To become one with god, to be god himself, is therefore the ambition of the *Brahmin* in his renunciations and self-denial [...] like the ancient peoples who [...] made a natural, generative process the prototype and the creative principle of the world in their religious doctrines [...], in which, just as plants arose from seeds, animals from animals, and man from man, so too did everything in nature arise from a natural being [...]” (Feuerbach, 2009, p. 89, 198-199).

**Shintoism:** Animistic polytheism, characterized by its myriad of deities and divine spirits that are directly invoked, yet precisely correspond to specific and mostly local manifestations of nature. “All strange and extraordinary phenomena [...] everything that captivates and enchants the human eye, that inflames the imagination, provokes astonishment, and affects the emotions in a special, unusual, and inexplicable way—all of this must be considered in the emergence of religion [...]” (Feuerbach, 2009, p. 60).

**African religions or religions of African origin:** Shamanic polytheisms, as their relationships within the divine pantheon are as significant as the individual bonds between mortals and their specific deities. For such relationships, various techniques are provided for communication with divine or semi-divine entities, each under priestly supervision, so that the *aiye* (material world) and the *orun* (spiritual world) may communicate. “[...] the polytheist transforms the separate forms and bodies of nature into gods and, precisely for this reason, takes as his prototype and standard the sensory, real, individual essence of man, [...] according to which his imagination deifies and humanises natural phenomena. Just as man is a corporeal individual, so are the gods of the polytheist corporeal and individual [...]” (Feuerbach, 2009, p. 215).

**Taoism:** Polytheistic pantheism, because no existence - not even that of multiple deities - resides outside the Tao, or the universally encompassing path, that permeates everything, and is consequently subject to its strict and permanent existential conditioning. During his pantheistic period, Feuerbach defined unified nature as comprising inherently multiple purposes: “In

the heavens, nature spreads its power outward; it demonstrates its intensity not in intensive realities, but in extensive realities. Where nature withdraws inward, where it withdraws and concentrates, and expresses its power in the form of power and intensity, [...] it becomes quality, species, animation, earth. [...] Since every purpose is conditioned by an infinite multiplicity of means and appearances, since every purpose has a history behind it, a process of mediating preparation, and since every purpose lies beyond and outside of sensible existence, you must recognise, from the very multiplicity of the stars, by their enormous size, that [...] this small earth is the fruit of the great cosmos” (Feuerbach 1980 [1830], p. 70).

**Buddhism:** Pantheism, because it perceives the universe as permeated by the same universal Law of change, to which living beings must adapt as they navigate the sufferings caused by inevitable changes. Through continuous subjective adjustments, throughout life or successive reincarnations, human experiences serve to bring about ever greater individual preparation until Buddhist or universal subjectivity (already inherent, but sublimated) that supersedes the illusions provided by desires. “Theism, which, as a position regarding god, is at the same time the negation of god, or, conversely, as the negation of god is simultaneously its affirmation, is pantheism. [...] All determinations of god [...] are determinations of reality, or of nature, or of man, or of both together. Therefore, pantheistic determinations; for everything that does not distinguish god from nature or from man is pantheism” (Feuerbach, 2008, p. 21)<sup>5</sup>.

**Jainism:** Pantheistic animism due to the sacralization of the natural world in general, which stems from the all-encompassing nature in which human beings possess the same dignity as every other animal. After mentioning the Jains, Feuerbach noted that “[...] just as nature in general has become an object of religion as the fundamental principle of human existence, in the same way animal nature could and should also become an object of religious worship.” (Feuerbach, 2009, p. 56).

**Confucianism:** Animistic deism, being deistic because “[...] the first cause of deism is merely the personified concept of cause; the essence of god is merely the essence of sensory things abstracted from their essential qualities; and the existence of god is merely the generic concept of existence” (Feuerbach, 2009, p. 156). But it also perceives natural phenomena as endowed with specifically inherent senses, without deities superior to them, as in a Confucian complement to the *I Ching* (an ancient text dating back much earlier, of which Confucius became one of the principal interpreters): “God refers to the creator of the wonders of ten thousand beings. In Him, to move the ten thousand beings, nothing is faster than thunder; to bend the ten thousand beings, nothing is more efficient than the wind; to dry up the ten thousand beings, nothing is more pervasive than fire; to bring joy to the ten thousand beings, nothing is more communicative than the lake; [...]. Therefore, water and fire stimulate each other, thunder and wind remain inseparable, the same breath connects the mountain and the lake, allowing for transformations and the

<sup>5</sup>Feuerbach wrote on Buddhism to counter the interpretation offered by Arthur Schopenhauer (1788-1860), who drew suicidal and moral conclusions from it. The interpretation of Buddhism by Feuerbach, unlike Schopenhauer's, regards it as guided by happiness, as the human ideal, but limited to the aspect of one's own and others' suffering. Therefore, Buddhist compassion is a form of kindness that is restricted to the relief or even the overcoming of suffering. However, Feuerbach considers passion to be fundamental for happiness, to the extent that it is not a transitory love but a permanent impulse whose fulfillment overtakes any frustrations, whereas any Buddhist orientation condemns it as illusory (Feuerbach, 2023; 2019).

accomplishment of the ten thousand beings” (Confucius *apud*. Cherng, 2003, p. 61–62).

**Freemasonry:** Deism to the extent that the deist philosopher Voltaire embraced it, although already in his old age, and he also regarded Confucianism in this light (Vallet, 2001, p. 261), literally to the degree that his belief in an architectural divinity of the universe made Freemasons into followers of the macrocosmic or natural laws instituted by it, and as a Masonic choice, because it was the most rational. Cosmic architecture had granted man free will through individual reason, to grasp the inherited universal laws, the observation of which in life would still convert the Masonic soul into light (a key foundation of universal divine construction) after death. “Deists themselves clearly distinguish in god between power and will or reason” (Feuerbach, 2009, p. 124).

**Spiritism:** Shamanic deism, since its doctrinally deistic characterization of the one deity distinguishes it both from the universal creation it made and from a providence that respects the free will of souls, having established Jesus solely to exemplify an inspiring human model of individual self-improvement and rejecting spiritual stagnation within and between incarnations (Kardec, 1954, p. 32–48, 217, 273, 321). However, it also has shamanic characteristics, as evidenced by the religious significance attached to mediumistic communication with the souls of deceased human beings, which Spiritists regularly organize (Kardec, 2009). Strictly speaking, Spiritists are, therefore, shamanic Christians: “Thus, Christian deists [...] attributed the cause of nature’s movement (since they regarded nature as a lifeless mass or matter) to divine power or omnipotence. [...] they in fact denied that god set matter in motion through an impact, [...] he is a spirit; he achieved this through his mere will. [...] But it is not only shamanism that has its roots in the belief in ghosts [...]” (Feuerbach, 2009, p. 173, 223).

**Wicca:** Pantheistic shamanism, because its deities, with a predominance of the feminine, are merely inseparable aspects of our planet, which include its cosmic surroundings. Its constituent elements play fundamental roles within this framework - both natural and human - by which the religion is guided, respectively, through masculine forest and animal exuberance, terrestrial and lunar femininity as the pillars of the soil and the tides, and through the magical manipulation of the elements air, fire, earth, and water in spells. “Yes! Man is not merely a spatial being in general, but also an essentially earthly being, inseparable from the earth. [...] The earth never allows anyone to escape its dominion. [...] But [...] I certainly raise my gaze to the farthest heavens, yet I see all things in the light and according to the criteria of the earth. In short, the fact that I am an earthly being, that I am not an inhabitant of Venus, Mercury, or Uranus, constitutes my substance, realises my fundamental essence [...]” (Feuerbach, 2009, p. 27, 110).

### 3. Conclusions: Toward the Intangible Cultural Heritage of Humanity through love’s meanings

“

Of himself, of nature, of the world, man knows and understands only the present; and of the past, only to the extent that it has left traces - signs that are still present in the present.

Posthumous Aphorisms (Feuerbach, 1874).

No human being needs to be Catholic to love others; Protestant, Buddhist, Spiritist, Freemason, or a follower of traditional or Afro-Brazilian religions to love themselves; Jewish, Confucian, Orthodox, Muslim, or Mormon to love their ancestors, even when they are family ancestors; Vedic, Taoist, Jain, Shinto, or Wiccan to love nature - whether inhuman or in general. But deciphering love, as highlighted in one of these religions - whether one follows any of them, or in all of them if one follows no religion (whether or not one is an atheist) - brings any human being closer to the self-knowledge of humanity. Generally speaking, the meaning of all human life is love, and consequently, the standard for a good - or at least a better - society enables each person to practice, above all passionately, what they love.

Furthering Feuerbach’s intellectual endeavour to decipher religion, allowing humanity to finally harness its imaginative and practical talents - still bound to religion - to the two realities upon which human happiness (both individual and universal) depends, I began with his historical identification of love in the Christian formulation, followed by an exploration of his anthropological comparison of other religions - distinct from Catholicism and Protestantism, in which Feuerbach had already identified the dichotomy of love for others versus self-love - whose significance extends beyond the region of the world where they originated.

By applying Feuerbach’s genetic-critical method - a method that identifies the human core or moral foundation of religious convergence underlying each theological framework, which defines the meaning specifically attributed to a religion as prevailing love - it was possible to compare their ritual roles in each, since they all consist of rites concerning the deities (monotheistic, polytheistic, deistic, animistic, shamanistic, or pantheistic) in which their followers believe. Feuerbach’s comparison of Catholic and Protestant traditions centres on the role of love, a focal point that mirrors my own findings across diverse world religions.

The loving core of a religion, once revealed, immediately becomes incompatible with the theological framework in which it is both expressed and concealed (since it is the human reality that gives rise to it as a historical phenomenon). Since a specific anthropology underlies the theology of any religious institution, simply exposing that human foundation is enough to collapse the theological structure, revealing the undeniable human love it obscures.

In line with Feuerbach’s hope, as expressed in his classic analyses of the two major branches of Christianity, I have also sought to contribute to humanity’s loving self-awareness, so that it may foster both community unity and preferential alliances with nature in general, in the very near future. This could be achieved through, according to the Feuerbachian perspective, the loving transformation of religions or humanity’s self-awareness of its communal needs within an inhuman nature.

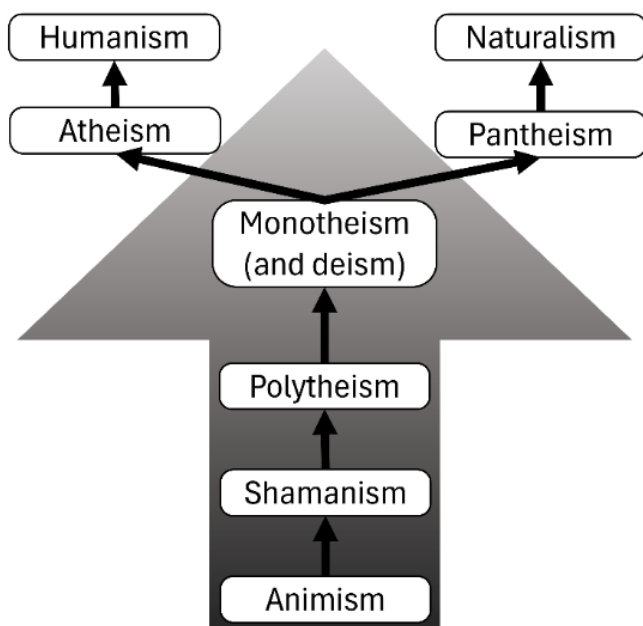
It is a matter of refraining both from humanizing an inhuman nature - as monotheistic, polytheistic, and deistic religions do by framing natural manifestations as supernatural - and from naturalizing humanity, as seen in animistic, shamanistic, and pantheistic traditions that regard humans as mere extensions of nature. That is why atheism only serves to avoid exacerbating religious profusion, but does not offer an effective alternative, since it is merely a denial of divinity or divinities. What is required of us is to be naturalists with nature and humanists with humanity, simply following our sensibility in (literally) every sense (Feuerbach, 2009, p. 256):

1) Assuming that nature is not goal-oriented, that it does not contain pre-established ends, but rather consists solely of recip-

rocal interactions among multiple elements, in which everything that can occur does so when the conditions for what is possible are met. This reality is all-encompassing yet far from omnipotent. To be truly naturalistic is to simply acknowledge it as our immediate and unchanging external condition - which is the only option for the human condition (whether individual or collective) - rather than denying nature, as certain religions do, sometimes partially (polytheists and deists), sometimes even entirely (monotheists): “While I need it, I am a servant; while I enjoy it, a master; in need I place myself below, in enjoyment above the object; there, I experience it as a being that exists in and of itself, independently of me; here, as a being that exists for me” (Feuerbach, 1967c, p. 32).

2) Assuming that humanity is communal, composed of culturally established ends, it is the second reality in which our lives unfold; yet its unity presupposes our individual differences within a dynamic or historical process that can be absolutely inclusive of diverse human beings and desires, since we are not reduced to our animal instincts. This communal vocation, without exclusions, depends solely on whether or not we deny human differences, as certain religions do, sometimes partially (pantheists and shamans), sometimes even totally (animists): “The greatest moral evils arise [...] from the fact that man extinguishes, in identity, the difference between himself and the other. It is true that we are both human beings, but this is the bare minimum; it is obvious. Equality must simply be emphasised in the face of the arrogance that does not allow the other to be human, that places itself above the other as a being endowed with privileges, [...] as the nobility once did in relation to the commoners, to the bourgeoisie; [...] in relation to artificial difference.” (Feuerbach, 1874, p. 312–313).

The following figure summarises the historical evolution of religion, up to its future overcoming—which is as naturalistic as it is humanistic, according to Feuerbach:



**Figure 1.** Feuerbachian religious evolution.

Source: Prepared by the author from Feuerbach (2009, p.165-170, 256).

Humanity conceived: natural phenomena endowed with a spirit of their own when our diffuse sensibility was impacted

by the dynamics of nature (animistic); an invisible world upon which nature was founded and which some human beings could perceive (shamanistic); and distinct forces (polytheistic) within the natural universe as its regularity became evident. But when human expansion into nature matched that of human sensibility, humanity became more attuned to itself than to the natural environment. It began to conceive of it as a divine gift - either total (monotheistic) or partial (deistic).

Therefore, from a Feuerbachian perspective, the contemporary era must be understood as one of a crisis in monotheistic civilization: as Catholicism stagnates, with a relative expansion of Protestant-Evangelical Christianity and the exponential growth of Islam (Mapscaping, 2025); conflicts emerge between human differences (especially LGBT+) that are made more visible by social media or channeled through expansive, pluralistic supranational structures (Lopes, 2024a; 2024b) and generally monolithic patriarchal or national traditions (Lopes, 2025b); apocalyptic versions of Judeo-Christian and Muslim monotheisms clash militarily, as in the recent U.S./Israeli attacks on *Shiite* Iran. Overcoming this challenge requires more than just articulating the communal and individualistic aspects of religion - as seen in the Catholic and Protestant traditions. Instead, we must embrace the diverse facets of love that these religions embody, especially in the modern era that Feuerbach defined by the ascent of Protestantism over Western christian monotheism (Lopes, 2025a, p. 2).

Since deities are imagined human desires (Feuerbach, 1857, p. 201), the anthropological revelation of love - from which they emanate - collides directly with religious fantasy, since to love is to realize a necessary human potential. The need for love implies a corresponding reality, even disregarding imaginary religious desires for immortality, omnipotence, and omniscience, for every human being grows weary of everything at some point and wants only a blissful life; no human being wants to have power or know everything, but only about objects of their preference (Feuerbach, 2009, p. 259–262).

Therefore, atheism<sup>6</sup> (the denial of divinity) or pantheism<sup>7</sup> (the deification of reality) are not viable alternatives to the monotheistic (and deistic) view that disregards nature, nor to the earlier (polytheistic) fragmentation of human communities. Both must be transformed into humanism and naturalism, respectively, whose union is inseparable as long as the various aspects of love poetically embodied by religions and embraced by humanity - make them the intangible heritage of an effective diversity of human identity upon which a unified community without exclusions can be built.

In accordance with the diagram presented on religious evolution, as each human being's love or passion becomes self-aware, Feuerbach argues that each person who follows a religion would naturally come to regard their religion as a cultural heritage of their personal identity and also as a cultural heritage of humanity - one that is important both to their own personal identity and to human identity in general. Atheists would come to view all religions as cultural heritage of humanity, since religious people see their religion in two ways - as their own and as belonging to

<sup>6</sup>“Even today, physicists and physiologists cannot explain a large part of the phenomena of organic and inorganic nature. But does that mean that these phenomena do not also have their own physical and physiological foundations, just like the other phenomena we can explain?” (Feuerbach, 2009, p. 175).

<sup>7</sup>“Is one part of nature physical and the other hyperphysical? Isn't nature a unity - nature everywhere, always nature? [...] In short, is this doctrine, like all theology, a reversal, a contradiction? It deifies nature, corporeality, and then abandons it again; it denies once more what makes that corporeality a true corporeality” (Feuerbach, 2009, p. 181).

humanity - while atheists come to regard all religions as cultural heritage of humanity.

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## Technology and Otherness: Postcolonial Perspectives on Brazilian Science Fiction of the 1960s

### Article Record

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### Abstract

This article examines the relationship between science fiction and coloniality in Brazilian literature through a postcolonial reading of two short stories published in 1961: “O Desafio” (“The Duel”) by Antônio Olinto and “O Menino e o Robô” (“The Boy and the Robot”) by Rubens Teixeira Scavone. It starts from the premise that, although science fiction is often associated with technological speculation and futuristic settings, the genre also functions as a privileged space for reflecting on historical and social tensions. In the Brazilian context, such narratives frequently engage, either explicitly or implicitly, with the country's colonial past and with the legacies of slavery and racial hierarchy that continue to shape national identity. The objective of this study is to analyze how these narratives reconfigure structures of domination and alterity within technologically advanced societies. The analysis is grounded in postcolonial studies, particularly the contributions of Edward Said and Frantz Fanon, in order to examine how the texts reproduce, question, or negotiate colonial discourses related to race, cultural authority, and social hierarchy. The study demonstrates that in both stories the robot functions as a symbolic figure of subordinated alterity. In “The Duel,” the robot T-55 embodies a technologically mediated version of the colonized subject, whose existence is regulated by human authority and by hierarchies of language and culture. In “The Boy and the Robot,” the apparently harmonious relationship between the boy and the robot evokes the Brazilian myth of racial democracy, while simultaneously preserving paternalistic structures rooted in servitude and dependency.

Technology

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ARCHIVAL RECORD

# Technology and Otherness: Postcolonial Perspectives on Brazilian Science Fiction of the 1960s

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## Abstract

This article examines the relationship between science fiction and coloniality in Brazilian literature through a postcolonial reading of two short stories published in 1961: “O Desafio” (“The Duel”) by Antônio Olinto and “O Menino e o Robô” (“The Boy and the Robot”) by Rubens Teixeira Scavone. It starts from the premise that, although science fiction is often associated with technological speculation and futuristic settings, the genre also functions as a privileged space for reflecting on historical and social tensions. In the Brazilian context, such narratives frequently engage, either explicitly or implicitly, with the country's colonial past and with the legacies of slavery and racial hierarchy that continue to shape national identity. The objective of this study is to analyze how these narratives reconfigure structures of domination and alterity within technologically advanced societies. The analysis is grounded in postcolonial studies, particularly the contributions of Edward Said and Frantz Fanon, in order to examine how the texts reproduce, question, or negotiate colonial discourses related to race, cultural authority, and social hierarchy. The study demonstrates that in both stories the robot functions as a symbolic figure of subordinated alterity. In “The Duel,” the robot T-55 embodies a technologically mediated version of the colonized subject, whose existence is regulated by human authority and by hierarchies of language and culture. In “The Boy and the Robot,” the apparently harmonious relationship between the boy and the robot evokes the Brazilian myth of racial democracy, while simultaneously preserving paternalistic structures rooted in servitude and dependency.

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## 1. Introduction

Science fiction has often been associated with technological speculation and futuristic imaginaries; however, in many national traditions the genre also functions as a privileged space for reflecting on historical and social tensions. In the Brazilian context, science fiction written during the mid-twentieth century frequently engages, whether explicitly or implicitly, with the country's colonial past and with the legacies of slavery and racial hierarchy that continue to shape national identity. Through the displacement typical of the genre, projecting conflicts into futuristic or technologically mediated scenarios, Brazilian writers explore issues of power, difference and social stratification that resonate strongly with post-colonial debates.

This article proposes a postcolonial reading of two Brazilian science fiction short stories published in 1961: Antônio Olinto's “O Desafio” (“The Duel”) and Rubens Teixeira Scavone's “O Menino e o Robô” (“The Boy and the Robot”). Although both narratives are set in technologically advanced societies and focus on the relationship between humans and robots, their plots evoke historical structures of domination that recall Brazil's colonial and slaveholding past. In these texts, the robot emerges as a symbolic figure of alterity whose existence is defined by servitude, control and limited autonomy, echoing the asymmetrical relations between colonizer and colonized described by postcolonial theorists.

Drawing on postcolonial studies, particularly the contributions of scholars such as Edward Said and Frantz Fanon, this study examines how these stories reproduce, question or negotiate colonial discourses related to race, hierarchy and cultural authority. In Olinto's “The Duel,” the robot T-55 embodies a technologically mediated version of the colonized subject, whose existence is controlled by human authority and whose access to culture and language reflects the hierarchies of colonial power. In Scavone's “The Boy and the Robot,” the relationship between the boy and the robot appears harmonious, evoking the Brazilian myth of racial democracy, yet the robot's role as servant and protector reveals the persistence of paternalistic structures rooted in slavery.

By analyzing these two narratives comparatively, this article argues that Brazilian science fiction of the 1960s reconfigures colonial dynamics within futuristic settings, transforming robots into metaphors for racialized and subordinated subjects. In doing so, these stories not only reflect the contradictions of Brazilian society but also demonstrate how science fiction can function as a critical lens through which the lingering effects of colonialism and slavery are imaginatively reexamined.

# 1. The Robot as the Colonial Other in Antônio Olinto's "The Duel"

Antônio Olinto's "The Duel", published in 1961 in the collection *Histórias do Acontecerá*, edited by Gumerindo Rocha Dorea, reflects the author's broad intellectual background as a teacher of languages, literature and history of civilizations, as well as his interest in Brazilian cultural history and African culture. Olinto was also a poet, novelist and literary critic, and his political involvement in public administration influenced the subtle tone of his social criticism.

Set in the year 2455, the story follows T-55, a highly advanced robot capable of speech and complex cognitive associations, though lacking emotions. After meeting Lactea, the daughter of its owner Flávio, T-55 begins to display unusual behavior. Recognizing the robot's exceptional linguistic ability, a colleague named Cláudio teaches it Latin and poetry so that it can compete in an interplanetary poetic contest. However, shortly before the event, Lactea dies in an accident, deeply affecting the robot. During the competition, T-55 initially performs brilliantly, but when a poem reminds it of Lactea, the robot collapses while repeatedly uttering her name. The episode reveals that T-55 had developed feelings for the girl, ultimately leading to its breakdown.

As Elizabeth Ginway points out, Antônio Olinto deals with issues of race in "The Duel". For her, "the story deals with the issue of race, or, more specifically, the idea of racial whitening, the alleged solution to Brazil's racial problem that developed after abolition in 1888" (2004: 50). In fact, the significance of the name and the whiteness of the girl is closely related to the theme of whiteness so explored by the colonial discourse in which color is a determinant element in the dualistic representation of classes. It is also a good reference to the myth of racial democracy. Such a myth is related to the way people dealt with slaves and non-white people in the past.

During the colonial era, it is estimated that most of the population of Brazil were Indians, blacks, mulattos and slaves; until 1600, slaves were primarily Indians. Soon thereafter, however, as the Indians were seen to be unfit for such work, they were increasingly replaced by Africans captured in and shipped from Africa as slaves. This notion of a white minority ruling over a majority non-white population continued until the 1880s, when a large number of European immigrants began to arrive in the country, especially in the southern states and an immediate process of whitening started to occur in the population. Communities of white immigrants, especially from Germany and Italy, tended to marry within their communities or those with some capital or those who were quickly successful in Brazil would tend to marry into (relatively) well-to-do local families which had at least some Portuguese blood.

In earlier times, a difference between Brazil as a colony of Portugal and, say, the United States or Canada, as colonies of Britain is that settlers from Britain arrived in family groups eg the Pilgrim Fathers or later on, families driven away from Ireland by the potato famine or from Scotland on account of the Highland Clearances, while Portuguese men tended to travel to Brazil alone, their idea being to make money in Brazil and then to return to Portugal and marry. It was therefore inevitable that Portuguese men would enter into informal relationships in Brazil, in the absence of women of their social standing, and this became a norm. Their issue were not necessarily discriminated against although it was rare, but not unheard of, for them to reach positions of influence when adults. In this sense, miscegenation in Brazil was looked on almost as an inevitable consequence of living in Brazil.

In the Anglo-Saxon world, miscegenation was normally regarded with moral opprobrium.

It is held that miscegenation in Brazil began to be noted in the 1600s: the outcome of Portuguese colonists entering into relationships with their slaves. The most important demographic change in this period was the emergence of a people of mixed race, predominantly the offspring of unions between the white Portuguese, the indigenous population and Africans which resulted in a great number of *Caboclos* (white/black and Brazilian Indian) and mulattoes. This kind of union produced a racial group who often served as intermediaries between blacks and whites.

Although the novel's setting is futuristic, its plot recalls the colonial era. The story takes place in the year 2462, in a period called the Second Renaissance (II Renascença), a time in which technology and science play a very important role in men's lives. There are robots for all kinds of work so that it is impossible to think of a world without them; their tasks vary from household chores to office work. However, their existence cannot exceed 10 years; after which time they are destroyed. The Second Renaissance, as the name implies is also a time of regaining the practices of poetry and writing. As in the colonial era, few people are literate or educated, only the ones who have had the opportunity of having an instructor or an intellectual mentor. Olinto depicts a society in which culture is predicated on the invisible labor of the 'other' suggesting the repetition of a discourse which recalls a past situation. In regard to this kind of discourse, one can link it to the figures of speech – strangeness, difference, exotic sensuousness, etc. – associated with the Orient in Said's *Orientalism*,

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They were handed down through the Renaissance. They (figures of speech) are all declarative and self-evident; the tense employed is timeless eternal; they convey an impression of repetition and strength; they are always symmetrical to, and yet diametrically inferior to, a European equivalent, which is sometimes specified, sometimes not (2003: 72).

This is exactly the way T-55 is seen: 'always symmetrical to and diametrically inferior to' human beings. It does not have any experience of life other than that imposed by its owner. In this sense, T-55 is an alienated subject whose language and customs have been rendered unprivileged by the imposition of a "new life" provided by a colonizing power. The way T-55 is characterized illustrates the view that colonized people have no meaningful culture prior to the arrival of the colonizer (Araújo 2014; 2021). The imposition of language, then, constitutes an important aspect in this symmetrical discourse of imperialism. T-55 does not have its own language, it speaks that imposed by human beings.

There are many aspects in Olinto's work which bear witness to the novel's relationship with colonialism. In general terms, technology represented by the robot is clearly seen as the 'precise economic equivalent of slave labor'. Thus the relationship between man and robot is very similar to that of master and slave; at the same time that men and machines seem to live in perfect harmony, there is a relation of superiority and power, the former having more power than the latter despite its spectacular skills. For example the idea that a *Transitório* (robot) cannot exceed 10 years, – as determined by its manufacturer – shows the power of man over it. The only reason for this short period of existence is the ultimate power of determining life and death. Short life ensures that the superior being stays in its place while the inferior one, in effect,

remains a child, unable to develop into a fully autonomous adult. Here one can make a parallel with slavery, which was sometimes justified with the idea that Black people were unable to look after themselves, that is, they were, in effect, like children.

“Os robôs haviam recebido o novo nome de transitório a partir do momento em que, tornando-se mais eficientes, mais vivos, quase humanos, tinham também diminuído o tempo de duração para dez anos (p. 51) [The robots had received the new name of transient from the moment when, having become more efficient and smart, almost human, their existence had also been reduced to ten years].

The more efficient and smart that robots become, the more their existence is reduced. This paradoxical statement recalls the colonial idea that a slave could never become like a master, a free and intellectually superior man; it also suggests that the colonized subject does not have any history and past. Here, one can also point out some similarities with the discourse present in 19<sup>th</sup> century Brazilian ‘mulatto’ fiction. The way the robot is depicted as a timeless subject in “The Duel” can be associated with the past of the mulatto blotted out, in order to avoid discovery, as can be seen in José de Alencar’s *Mãe* (1860)<sup>1</sup>. In Brazilian literature, it is common to find characters who try to hide their roots at all costs. This behavior is well demonstrated and identified by Frantz Fanon in *Black Skin, White Masks* (1952) as a direct consequence of the colonial undertaking. According to him:

“The black man possesses two dimensions: one with his fellow Blacks, the other with the Whites. A black man behaves differently with a white man than he does with another black man. There is no doubt whatsoever that this fissiparousness is a direct consequence of the colonial undertaking (2008: 1).

Although Fanon is referring to the black Antillean, he suggests that critics shall enlarge the scope of his description to include every colonized subject in whom an inferiority complex has taken root. In “The Duel”, having an inferiority complex plays an important role in T-55’s behavior. Its shyness and loneliness seem to represent a lack of confidence and self-esteem similar to that generated by the colonial undertaking justifying the idea that the white/colonizer must be always in the control of any event and the existence and progress of the black/colonized, here represented by the robot, depends on the former’s manipulation. Commenting on this asymmetrical relation, Edward Said (2003: 40) states that “what gave the Oriental’s world its intelligibility and identity was not the result of his own efforts but rather the whole complex series of knowledgeable manipulation by which the Orient was identified by the West”. This colonial discourse is well illustrated by Antônio Olinto in the way he shows the humans’ attitudes toward the robot

which represents the other – the black man, slave, colonized and Orient – in a more technological and modern world.

This idea of the robot as ‘almost’ human is also explored by some Anglo-American writers; however, their robots are not racialised as in Brazilian science fiction. The American writer Philip Dick, for instance, sets the relationship between man and machines as one of his most important themes. In *Do Androids Dream of Electric Sheep?* (1968), for example, he explores the way in which human identity is cast adrift under the technological imperative in the same way that Olinto does in “The Duel” but with a slight and significant difference regarding the thematic issues of temporality. While in “The Duel” there is no perspective of future life for robots since they have a short time life and no perspective of changing this reality, in *Do Androids Dream of Electric Sheep?* Androids have acquired some independence and because of that they do not accept the idea of being replaced or destroyed. Because of their rebellious behavior, androids represent a threat for American society which fears the possibility of losing control of them. Arguably, the novel can be seen as a critique of colonialism and an illustration of the American racial segregation and Civil war. In this perspective, both stories are related to issues of national identity (Andrade, 2024). However, because of Brazil’s status as a Third World country and because of its ‘peaceful’ colonial history, Brazilian technology will never be able to be independent and achieve the same fulfillment of a country without a colonial history or which has dealt with colonialism in a different way. It is worth pointing out that Olinto’s story preceded Dick’s, despite Dick’s having become canonical.

Also important is the way the writers deal with language. T-55 is a good Portuguese speaker but it has to learn Latin which is considered the language of the intellectual elite. This is a very important issue emphasized by Fanon in *Black Skin White Masks*:

“To speak means being able to use a certain syntax and possessing the morphology of such and such a language, but it means above all assuming the culture and bearing the weight of a civilization... the more the black man assimilates the French language, the whiter he gets – i.e., the closer he comes to be a human being... (2007: 1).

As can be seen from Fanon’s words, to be considered a human being, the Negro must speak not his own language but French which is the language of the metropolis and the elite. So, to assimilate it means to acknowledge the world expressed and implied by it. Fanon also adds that all colonized people in whom an inferiority complex has taken root, whose local cultural originality has been committed to the grave, position themselves in relation to the civilizing language. In “The Duel” this same exigency is imposed upon the robot. Here, the language of power is Latin – hence the Latin poets that T-55 becomes familiar with – which was also the language of the elite in the colonial era. To speak Latin meant, above all, being able to understand the world and control it. T-55 was able to speak Portuguese and presented great linguistic abilities but it was not enough, to achieve a higher position it had to learn Latin. However, T-55 showed some difficulties in applying the vocative for it had to take the initiative of using it and T-55 could not do so easily.

<sup>1</sup>This novel was published in 1860, during the time of slavery in Brazil. The central figure in *Mãe*, is a black skinned woman, Joana, who pretends to be the slave of her son to hide his origin as the offspring of a slave and a white man. Her son is a medical student who thinks he is descended from a white family. However, he is supported by the earnings of his slave-mother who washes and irons clothes. Joana sacrifices herself to help and give her son comfort, including prostituting herself. Nevertheless, when the truth comes out she is humiliated by him and his friends. She commits suicide with the words “my son” on her lips.

[...] The relations of the transients with Latin were curious. Men felt themselves linked to a line of tradition. The transients didn't; they were loose ends of whatsoever prior knot. The former language had become so impersonal that it had abolished the so-called direct objects. The transients do not get used to the natural use of the vocative. Perhaps the problem was in their relative lack of initiative because in fact the vocative is an initiative... (p. 55).

This passage illustrates the attitude of the colonized subject toward the imposed language. If on the one hand, he accepts this imposition and posits himself in the position of a subject without any culture, any civilization and any historical past; on the other hand he is not able to learn the colonizer's language properly. In Fanon's conception, this attitude results in a vicious circle in which Whites consider themselves superior to Blacks and Blacks want to prove at all costs their wealth of intellect and equal intelligence. Here the emphasis is on the idea that there will always be an asymmetrical relation between colonized and colonizer.

In this regard Said (2003: 40) comments that the essential relationship, on political, cultural, and even religious grounds, was seen to be one between a strong and a weak partner. While the colonizer is seen as rational, virtuous, mature and normal, the colonized is seen as irrational, depraved, childlike and aberrant/abnormal. By its nature, T-55 kept most of these characteristics; "Logo que a fábrica o entregara, todos compreenderam que se tratava de um tipo diferente de transitório... (p. 51) [when the factory had delivered it, everybody understood that it was a different kind of transient...]. Here, the robot can be deemed a childlike figure since it is remote from the influence of historical change. Moreover, its status does not allow it to grow up and be independent or to live on its own, as we have seen before.

The fact of being different constitutes a very painful mark for the colonized or black man, here represented by T-55. Olinto's protagonist seems to understand that a robot is extremely different from human beings. There is a huge barrier between its world and man's world. No matter its poetic talents, it would never be a real man. Clearly Olinto is using the colonial discourse that consists of making the Other believe that he could try to be similar to the Whites but he will never be one of them.

This idea seemed to be internalized in T-55's mind; the white girl would never have any kind of relationship with the robot. The way it behaves when the girl appeared in the company demonstrated that it hid any kind of feeling for her: "... sempre que a menina aparecia ele se alheava um pouco (p. 10) [... every time the girl appeared it shied away a little]". T-55 acted as if he had internalized the colonial idea that it would never be more than a slave of the modern world. If on the one hand, T-55 had developed a strong relationship with Cláudio, Flávio and other workmates, symbolizing the harmony between different races; on the other hand, there was a huge distance between the robot and the girl which suggests that such harmony can only be possible insofar as it satisfies the man's interests. Olinto seems to embrace a positive image of racial democracy, but, undercutting this, there is an anxiety about interracial sexual contact, at least when the woman is white. This behaviour calls into question my earlier comments about the relative ease with which Brazilians accept miscegenation.

As I have pointed out before, the girl's name, Lactea, is hugely suggestive of some of the assumptions present in colonial

discourses. The whiteness of the girl as well as the whiteness of other characters seems to raise an unbreakable barrier between the protagonist and her; to be white means to be inaccessible and untouchable. Indeed, there is no dialogue or contact between the two characters, despite T-55's talent for speaking. What child, on seeing a robot, would not approach and talk to it? We would expect children to react in this way toward robots. In "The Duel", however the opposite happens, the girl acts as if T-55 did not exist which reflects an uncommon behaviour for a child since in most modern narratives children are always playing and making use of robots. Olinto's decision to maintain a distance between the girl and the robot reflects the logic of colonial power and, arguably suggests the author's complicity with such power or his difficulty in outmanoeuvring it in his discourse, as pointed out by Fanon (1988).

Paradoxically, at the same time that Olinto invests in a good image of Brazil as a racial democracy, he insists on giving a colonial end to his novel, suggesting that the robot is only replacing the black slave and because of that it cannot have a happy relationship with the white girl.

In discussing the prejudice between whites and blacks, Fanon relates the episode of Jean Veneuse, a black poet who falls in love with a white girl but could not break down the barrier of prejudice and had to understand that he lived in a world that was not his.

... Here is our black man who through his intelligence and hard work has hoisted himself to the level of European thought and culture, but is incapable of escaping his race... Jean Veneuse believed in this culture and had begun to love this new world he had discovered and conquered for his own usage. What a terrible mistake!... Feeling that he would be unable to live without love, he dreams it into being through poetry: 'When you fall in love, you must never say so, better to keep it a secret from oneself' (2007: 47).

The similarity between the ways in which the two writers deal with race is undeniable. It is possible that Olinto had read Fanon by the time he wrote "The Duel" which could have influenced him in some aspects of his work. Although Olinto is not of African descent, he visited Africa and had a passionate interest in African music and culture. Fanon's intention to enlarge the scope of his description to include every colonized subject means that the facts he sets out are not isolated in time and space but represent a worldwide view generated by the phenomenon of colonization.

Although Olinto wrote "The Duel" during the 60s, he opts to adopt a discourse which advocates the values of colonization and imperialism as necessary for a nation. By humanizing T-55, Olinto opens a range of possibilities of reading the story from a colonial perspective. T-55 dies, instead of stopping working. According to Cláudio: *Os Transitórios não morriam: deixavam de funcionar* (p. 64) [*The Transitórios did not die, they stopped working*] That was the first time that someone used the verb 'to die' to refer to a robot.

– Morreu sim. Sabe por quê? Por ter conquistado a fraqueza e a ternura. Foi a ternura que matou T-55 (p. 64) [T-55 did die. Do you know why? Because he had acquired weakness and affection. It was the affection that killed T-55].

The robot died repeating the Latin expression ‘Lactea nomen habet, candor notabilis ipso’ which comes from Ovid and means: “Tem o nome de Lactea, notável pela sua brancura” (p. 65) [She has the name Lactea, notable for her whiteness]. Undoubtedly, this is a reference to racial issues and the overvaluation of being white as a fundamental aspect of superiority and social ascent. In his attempt to contemplate aspects inherent to Brazilian identity, Olinto does not show any resistance to this vicious circle, as we can see from the end of the story. Instead, he is inspired by the attempts to copy the dominant trends in the literature of the colonized power, as described by McLeod (2000: 86). In so doing, he joins a group of writers who according to Fanon, are in danger of identifying more with the middle-class bourgeoisie of the colonizing nation rather than with the *indigenous* masses. Thus, as a white Brazilian writer who occupies both a position of neocolonial subjection – given Brazil’s relation to the US in the 1960s, as discussed previously – and a position of belonging to the race that had historically, held colonial power in Brazil, he maintains the colonial discourse, though non-intentionally. If, on the one hand, readers are driven to sympathize with the robot and become sensitive about its situation which might be subversive in relation to colonialism, on the other hand, the narrative reinforces received ideas about racial hierarchy instead of racial democracy.

Comparing Olinto’s “The Duel” (1961) to Henry Kuttner’s *The Proud Robot* (1943), it is possible to highlight some important points of divergences in terms of the writer’s position toward colonialism. Kuttner’s story is a satire of how technological society may lose control of its inventions. After designing a robot named Joe, the inventor Gallagher forgets the original reason for which Joe was being designed. As a consequence, the robot starts to behave like a human being and becomes proud of itself which could be a threat for its inventor. Knowing that machines without specific purposes might turn in on themselves and rebel against human beings, Gallagher manages to hypnotize the robot in order to discover its initial function so that he could program it to obey only one command to do the job he was made for.

Like Joe, T-55 was distorted from its original function. However, while Kuttner recognizes the possibility of a rebellion and opts for taking control of the situation and reconnects his robot to the purpose it was made for, Olinto does not give his robot the possibility of restoration but rather opts to tackle the evil at its root. This attitude may suggest his adhesion to the colonial idea that there is no possibility of ascent for the inferior race. Thus, as a Brazilian intellectual, arguably, Olinto opts out of involvement in the people’s struggle against colonialism.

## 2. The Illusion of Racial Harmony: Postcolonial Readings of Scavone’s “The Boy and the Robot”

Rubens Teixeira Scavone’s “*The Boy and the Robot*”, published in 1961 in the collection *O Diálogo dos Mundos*, is considered an innovative contribution to Brazilian science fiction. A lawyer and professor, Scavone was deeply aware of the political and economic challenges faced by Brazil in the 1960s. Although he held an important position in the state justice office and maintained an apparently apolitical stance, his works often address fundamental human dilemmas shaped by social and cultural contexts.

The story centers on a boy whose father, an interplanetary urban planner frequently absent from Earth, buys him a sophisticated robot as a companion. Designed to speak several languages and to synchronize telepathically with the boy’s brain waves, the robot anticipates his thoughts and becomes his constant companion, helping with daily activities and schoolwork. The boy develops a

deep emotional bond with the machine, treating it like a brother. However, when the boy falls ill with a mysterious fever, the robot remains by his side but is unable to help after their telepathic connection is severed by a doctor. Following the boy’s death, the robot eventually overloads and destroys itself, revealing that it had developed human-like emotional responses.

It is not difficult for an attentive reader to notice how essentially similar this story is to Antônio Olinto’s “The Duel”. In both cases the issue of robotic emotion is explored using a similar scenario, the robot’s love for a human who dies. This theme of robotic emotion is, as I have pointed out in the earlier section on Brazilian science fiction of the 60s, something that is also a common theme of the United States science fiction of the period. However, because of Brazil’s colonial history and slavery, Brazilian science fiction treats the theme differently.

Rubens Teixeira Scavone’s “The Boy and the Robot” is another example of how science fiction was preoccupied with issues of race in the 60s. The way Scavone deals with technology recalls many aspects of Brazilian society during the colonial period. The beginning of the story is marked by a strong feeling of nostalgia. The new house, despite its sophistication, is compared unfavorably with the old one which was simple but comfortable.

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Nada para ele justificava a mudança... a casa antiga era confortável e sempre supria as necessidades da família... O [novo] lugar podia ser mais bonito do que a velha casa, mas era deserto, mergulhado na floresta de abertos, escorado nas encostas da montanha... (p. 48) [For him, nothing could justify the change... the old house was comfortable and always supplied the family’s needs... The new house was more beautiful but in a deserted place, plonked into the forest with clearings, clinging onto the slopes of the mountain...].

Here, there is an explicit exaltation of the past presented as if the modern and technological environment were not able to fulfill all human aspirations. The author seems to be aware of the harm technology can cause to people’s lives. The description the scientist gives of the place where his house is situated, suggests complete isolation and solitude; if for his wife, the new suburban and modern house represents peace, comfort and prestige, for him, it represents isolation and sadness. The existential conflict to which the family succumbs can be seen as a reflection of the political and economic crisis Brazil faced in the late 50s and early 60s. If on the one hand Brazil showed some technological advance, on the other hand it could not support itself in economic and policy-setting terms. This paradoxical situation generated the idea that Brazil had become a colony again. This feeling of ‘coming back’<sup>2</sup> to the past is very well illustrated by Scavone in the movement of the family from an urban to a suburban area, as well as in the figure of the robot whose main function is to be the boy’s ‘mucama’<sup>3</sup>.

For the society depicted by Scavone, to have a robot represents prestige and economic ascent, recalling slave ownership during the

<sup>2</sup>During the 60s, the social hierarchy retained much of the flavor of Brazil’s colonial era. Brazil’s rapid urban growth attracted huge populations, most of whom had to find casual jobs or jobs not covered by labor legislation (known as the informal sector) because the cities lacked the formal sector jobs to support their populations. The rural masses chose to move to the city because they considered their economic opportunities would be better there. The country was not prepared for such a huge change. It gained invaluable technology, although often only through foreign investments which compromised its political and economic dependence.

<sup>3</sup>Slave whose main function is to serve his/ her master’s son or daughter.

colonial period. The robot's task is the same as that of a domestic slave: for general purposes, and to provide the boy with company and protection.

“Assim não ficará mais isolado em sua ausência. Ficarei mais tranqüila com a guarda feita pelo robô e ele não terá mais inveja dos amigos... (p. 48) [That way he will not feel isolated in your absence. I will feel safer with the security provided by the robot and he will not be envious of his friends...].

The robot's role has little to do with technology; it functions as a playmate, servant and friend. In fact, the boy recognizes that a human brother would not be better than the robot. The harmonious relation between the boy and the robot recalls the myth of Brazil as a racial democracy. For the boy, the robot is more than a brother. However, this harmony is contradictory if one thinks about the functions the robot develops: “Jamais se sentava (p. 51) [it never sat down]”. The robot is always close to the boy ready to do whatever is necessary to make him happy, as if it does not exist on its own; the only reason for its existence is the boy. Here, Scavone seems to highlight the limits of the ‘racial democracy myth’ and the idealized, paternalistic myth of the ‘good’ side of the slave owning society.

This is also a good illustration of how the West sees the Orient. The robot's labor is important and necessary to modern society. In the same way that the boy's loneliness justifies the purchase of the robot, Orientalist representations function to justify Western colonial rule over Eastern lands. For McLeod, the natural structure of a society legitimates the domination of other peoples and “lubricate[s] the political and judicial structures which maintain colonial rule through physical coercion (2000: 43). According to Said,

“Subject races did not have it in them to know what was good for them... One of the convenient things about Orientals is that managing them, although circumstances might differ slightly here and there, was almost everywhere the same. This was, of course, because Orientals were almost everywhere nearly the same (2003: 37).

If the robot represents the slave in Brazilian society, its attitudes would be similarly servile since the domestic slave is often described as a docile, friendly and submissive person who almost always demonstrates affection for his/her masters. In Scavone's work, there is no fear of rebellious behavior from the robot; under no circumstances do his parents show any sign of being worried about the relationship of their son with the robot. The fact of their brains being connected is another factor that indicates the robot's limitation and submission. The robot has all its senses telepathically controlled by the boy's brain. And even its ability to speak three different languages does not give it any power or prestige since it does not have any independence or voice. Although the text is constructed by direct and indirect discourse, there is only one record of the robot's voice:

“O menino apenas pensou a pergunta. Imediatamente a antena vibrou...  
– Seu pai chegou ontem a Venus. É noção elementar que a astronave, deslocando-se com velocidade cósmica número dois, atingirá o segundo planeta em 22 dias, duas horas e treze minutos (p. 51)  
[The boy only thought the question. Immediately its antenna vibrated...  
– Your father arrived on Venus yesterday. It's an elementary notion that a spaceship moving at cosmic speed number two, will reach the second planet in 22 days, two hours and thirteen minutes].

As can be seen from the quotation above, the only reference to the robot's voice is to answer the boy's unvoiced question and curiosity about his father trip; even with its linguistic efficiency, there is no space for autonomous, distinctive self expression. Its function was to meet the boy's needs. In this respect, its status can be compared to that of the Black man described by Fanon: “Whether he likes it or not, the black man has to wear the livery the white man has fabricated for him” (2008: 17). And here ‘livery’ can be taken as all the characteristics that the family at the store requires the robot to have. The robot speaks not because it is able to but because it is fabricated to do that. Like Olinto, Scavone deals with language issues as a way of showing that the dominant class imposes its language and culture on the inferior class. This is also a good illustration for Fanon's ideas that “all colonized people in whom an inferior complex has taken root and whose local culture has been committed to the grave, position themselves in relation to the civilizing language” (2008: 2).

Scavone's robot can also be seen as a representation of Brazil as a technologically dependent nation. According to Skidmore (1999:46), during Juscelino Kubbitschek's government, Brazil had achieved rapid economic development and industrialization. By 1961 it had an integrated motor vehicle industry and was on the way to creating the many ancillary industries vital to vehicle production. There were also impressive gains in electricity generation and road building. However, this growth strategy stemmed from the way it was financed. Brazil's domestic savings remained chronically low, with few investments. The government needed foreign capital to supplement domestic investment; without foreign support the growth in inflation and the mounting balance-of-payment deficits would become unbearable. This economic fragility stimulated intervention from outside Brazil which resulted in political impotence and economic dependence. Although the country had shown some technological advances it was submissive to the developed nations. This situation is quite similar to that of the robot which behaves like the boy's slave although it is in many aspects superior to him.

The feeling of impotence, inferiority and dual existence is strongly emphasized by Scavone through the conflictual life of the scientist who also seems to represent the nation as it experiences the crisis of modernization. The description given by the scientist of his impressions and feelings during his trips into space recalls the way many economists described Brazil in the late 50s and early 60s. According to Skidmore (1999: 152), the country's accelerating population growth rate led to an increase in the ranks of job seekers. To create those jobs, Brazil badly needed to diversify its economic base. The debate over economic strategy in Brazil was polarized by the Marxists and statists on the left and the neo-liberal on the right.

In 1960, President Juscelino Kubitschek had tried to combine elements from both ideologies. In the end, his balancing act had failed. He had given new life to the trade-off between left and right. But with the succession of Goulart in 1961, Brazil faced a recurrence of the confrontation of 1954 – a populist president, this time with an unstable political base and limited parliamentary power, versus the military. Everything gave the impression of impotence and failure. This feeling seems to be illustrated by Scavone's representation of the scientist:

“... O pior não é a distancia. É a impressão de dupla existência. Toda vez que entramos na nave, temos a impressão de penetrar em outra vida, como se fossemos outras pessoas, como se não fossemos nós. Tudo se torna irreal, impalpável. Não sei, temos pensado muito nisso sem chegar a qualquer solução... Só as fisionomias são iguais. No resto, somos estranhos, pertencemos a outra realidade, a outra vida, personagens saídos do sonho, da memória, do subconsciente... (p. 47) [...] Distance is not the worst of it. What is, is the impression of dual existence. Every time we get into the spaceship, we have impression of penetrating into another life, as if we were other people, as if we were not us. Everything becomes unreal, impalpable. I don't know, we have thought a lot about it, without reaching any solution, though... Just what we look like is the same. As to the rest, we are weird; we belong to another reality, to another life, characters who've emerged from our dreams, memory and subconscious...].”

This is clearly an allusion to the government's impotence vis-à-vis the political facts. The character lives in a modern and different world but he feels as if he were not the same person, as if something had changed his personality and identity. He depicts himself as the 'Other': limited, inferior, impotent and weird, in search of recognition. In this regard, he can be compared to the black Antillean man described by Fanon: “Whenever he is in the presence of someone else there is always the question of worth and merit” (p. 186). He does not possess a personal value of his own and is always dependent on the presence of the other. Interestingly, the robot is the proof of his power and wealth but is also his substitute on Earth, the one who will keep the boy safe while he is in space; hence the two characters seem to share some common characteristics. If on the one hand the scientist represents the master/owner of the robot, on the other hand he is cast as a colonial subject, lacking in self-confidence and autonomy, who somehow takes on the role of colonial authority figure over the robot, perhaps in order to control his own insecurities and sense of inadequacy. Referring to this ambivalence in the colonial discourse, Bill Ashcroft states:

“The dominant discourse constructs Otherness in such a way that it always contains a trace of ambivalence or anxiety about its own authority. In order to maintain authority over the Other in a colonial situation, imperial discourse strives to delineate Other as radically different from the self, yet at the same time it must maintain sufficient identity with the Other to give value to control over it. The Other can, of course, only be constructed out of the archive of 'the self',

yet the self must also articulate the Other as inescapably different (1989: 103).

This ambivalent discourse can also be associated with Scavone's position as a writer and a member of the government. His ambiguous critical relationship with it is arguably attributable to the absence of intellectuals who might have assumed an individual critical position against the imperial discourse constructed by the colonial system. In the novel, the scientist seems to be the figure who best describes Brazil in its first years of technological development and industrialization – apparently richer and more developed but supported by private investments and the International Monetary Fund (IMF). The robot, then, can be seen as the result of this complicated process of modernization, and so, it is not portrayed as an autonomous and self-confident figure.

Thus, the robot will never be more than a robot, despite its 'almost human' characteristics. It will always be seen as a slave for general purposes, a mechanic doll, the 'Other' without a history, a family or someone who can change his/her destiny or objectified status. As in Antonio Olinto's “The Duel”, the only way of showing the robot's human characteristics is that it dies, which suggests that the 'Other' will always be defined as such, no matter how similar he is to his counterpart. Furthermore, if the robot represents the result of the technological development in Brazil, this is shown in a very negative light which reflects the way Brazilian critics associated technological development with a neo-colonial experience. In this respect Scavone seems to reproduce colonial discourse as part of the Brazilian inheritance although he sometimes advocates a more dynamic and vacillating relationship between the present and the past.

Both Scavone and Olinto fail to produce a discourse which does not celebrate the obedient colonized subject. Without resisting the medium of colonial discourses while dealing with issues of Brazilian colonial history, they explore myths of national identity such as the myth of racial democracy and a docile people and produce science fiction works from a perspective that is very different from that of the Anglo-American tradition. At the same time that these writers usefully show the then prevailing political situation in Brazil, they draw parallels with Brazil's colonial history in order to demonstrate that the desire for technological progress has led Brazil to a neocolonial situation.

## 2. Final Considerations

This study sought to examine how Brazilian speculative narratives from the mid-twentieth century engage with questions of race, memory, and social inequality. Through the analysis of Antônio Olinto's “*O Desafio*” (1961) and Rubens Teixeira Scavone's “*O Menino e o Robô*” (1961), it becomes evident that science fiction and speculative literature in Brazil offer important spaces for reflecting on the historical legacy of slavery and on the ideological construction of racial democracy.

In Olinto's narrative, the persistence of slavery's legacy emerges as a structural element shaping social relations, revealing how historical violence continues to reverberate in the present. The text exposes tensions between past and present, suggesting that the abolition of slavery did not eliminate the deep inequalities rooted in Brazilian society. By revisiting this legacy through a speculative framework, the narrative invites readers to confront the enduring effects of historical injustice.

Scavone's "O Menino e o Robô," in turn, mobilizes the conventions of science fiction to explore themes of technology, humanity, and social relations. Although the story is centered on the emotional bond between a boy and a robot, its narrative context allows for broader reflections on Brazilian social imaginaries, including the notion of racial harmony frequently associated with the myth of racial democracy. When read critically, the story opens space for questioning whether such harmony conceals deeper social hierarchies and exclusions.

Taken together, these works demonstrate how Brazilian speculative fiction can function as a critical lens through which the nation's historical and social contradictions are examined. By articulating themes such as memory, inequality, and identity within imaginative narratives, these texts contribute to expanding the scope of Brazilian literary studies and highlight the relevance of speculative genres in discussions about race and society.

This analysis reinforces the importance of revisiting mid-twentieth-century Brazilian speculative narratives not only as literary experiments but also as cultural documents that engage with the complexities of Brazil's historical formation. Future studies may further explore how science fiction and related genres participate in the ongoing re-evaluation of national identity, particularly in relation to race, technology, and the legacies of colonialism and slavery.

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## Deliberate Closure of Constructed Spaces: An Anthropological Analysis of Backfilling and Sealing in the Ravne Tunnel System (Bosnia and Herzegovina) and Göbekli Tepe (Turkey)

### Article Record

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### Abstract

Subterranean tunnel systems across Europe and the Near East frequently exhibit evidence of post-construction modification, including blockage, infilling, and structural segmentation. In several cases, these features appear to reflect organized phases of closure rather than purely natural depositional processes. The Ravne tunnel complex in Visoko Valley (Bosnia and Herzegovina) provides a particularly well-documented example, with extensive field observations revealing repeated dry-stone wall constructions and stratified backfill deposits throughout the system. Comparative analysis with underground sites in Cappadocia (Turkey), Hal Saflieni (Malta), and Central Europe (Austria) indicates that intentional closure or controlled access restriction has been documented across multiple archaeological contexts, although it is expressed through different construction techniques and geological settings. At Ravne, the presence of 85 documented dry-stone walls, combined with sharply defined infill layers that contrast with the surrounding conglomerate matrix, is consistent with structured modification of subterranean passages. Radiometric analyses from associated tunnel contexts provide additional chronological constraints, with radiocarbon and Uranium-Thorium dating of speleothem formations and organic materials indicating multiple phases of human activity and subsequent environmental stabilization spanning from the Neolithic to historical periods. These data do not directly date the initial excavation of the tunnels, but they establish a minimum temporal framework for the structural features and later modification processes. Taken together, the stratigraphic, structural, and comparative evidence suggest that the Ravne tunnel system underwent systematic phases of modification, possibly including deliberate closure events. While alternative natural explanations cannot be entirely excluded in all cases, the recurring architectural patterns and contextual relationships observed across multiple sectors support the interpretation of organized human intervention. This study contributes to broader discussions on subterranean architecture by highlighting the importance of closure phases as a potentially underrecognized component of underground system use, transformation, and long-term preservation.

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# Deliberate Closure of Constructed Spaces: An Anthropological Analysis of Backfilling and Sealing in the Ravne Tunnel System (Bosnia and Herzegovina) and Göbekli Tepe (Turkey)

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## Abstract

Subterranean tunnel systems across Europe and the Near East frequently exhibit evidence of post-construction modification, including blockage, infilling, and structural segmentation. In several cases, these features appear to reflect organized phases of closure rather than purely natural depositional processes. The Ravne tunnel complex in Visoko Valley (Bosnia and Herzegovina) provides a particularly well-documented example, with extensive field observations revealing repeated dry-stone wall constructions and stratified backfill deposits throughout the system. Comparative analysis with underground sites in Cappadocia (Turkey), Ħal Saflieni (Malta), and Central Europe (Austria) indicates that intentional closure or controlled access restriction has been documented across multiple archaeological contexts, although it is expressed through different construction techniques and geological settings. At Ravne, the presence of 85 documented dry-stone walls, combined with sharply defined infill layers that contrast with the surrounding conglomerate matrix, is consistent with structured modification of subterranean passages. Radiometric analyses from associated tunnel contexts provide additional chronological constraints, with radiocarbon and Uranium-Thorium dating of speleothem formations and organic materials indicating multiple phases of human activity and subsequent environmental stabilization spanning from the Neolithic to historical periods. These data do not directly date the initial excavation of the tunnels, but they establish a minimum temporal framework for the structural features and later modification processes. Taken together, the stratigraphic, structural, and comparative evidence suggest that the Ravne tunnel system underwent systematic phases of modification, possibly including deliberate closure events. While alternative natural explanations cannot be entirely excluded in all cases, the recurring architectural patterns and contextual relationships observed across multiple sectors support the interpretation of organized human intervention. This study contributes to broader discussions on subterranean architecture by highlighting the importance of closure phases as a potentially underrecognized component of underground system use, transformation, and long-term preservation.

**Keywords:** *Subterranean archaeology, Anthropogenic backfill, Stratigraphy, Dry-stone walls, Speleothem dating, Site formation processes, Ravne tunnel complex, Comparative archaeology, Tunnel closure, Bosnia and Herzegovina*

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## 1. Introduction

The deliberate closure of constructed spaces represents a recurring phenomenon in archaeological contexts, yet it has received relatively limited systematic attention as a distinct form of human behavior. Across different periods and cultural settings, archaeological evidence indicates that built environments - whether monumental, domestic, or subterranean - are not always abandoned passively. Instead, they are often intentionally filled, sealed, or otherwise transformed through structured human intervention. Such processes, including backfilling, material deposition, and architectural blocking, form part of what has been described as the life cycle of built environments (Schiffer, 1987; Cameron & Tomka, 1993).

In archaeological interpretation, these practices are commonly discussed in relation to site formation processes, abandonment behavior, and the transformation of built space. Stratigraphic analysis

plays a key role in identifying such processes, particularly where clear distinctions can be made between natural deposits and anthropogenic infill (Harris, 1989). Geoarchaeological approaches further emphasize the importance of sediment composition, depositional context, and micromorphological characteristics in distinguishing between natural and cultural formation processes (Courty et al., 1989; Goldberg & Macphail, 2006; Karkanas & Goldberg, 2019). Within this framework, deliberate closure may be understood as an active and meaningful transformation of space rather than a passive end to occupation.

From an anthropological perspective, the intentional modification or termination of constructed environments may reflect broader social, symbolic, or functional processes associated with the reorganization of space and the redefinition of its use (Hodder, 1999; Ingold, 2000). In this sense, closure can be viewed as a structured

component of human interaction with built environments, rather than an incidental or purely practical activity.

Comparable practices of intentional infilling and structural transformation have been documented at several archaeological sites worldwide. At Göbekli Tepe, circular megalithic enclosures dating to the Pre-Pottery Neolithic period were systematically filled with heterogeneous material following their use. At Çatalhöyük, domestic structures were repeatedly buried and rebuilt, creating a stratified accumulation of occupation layers. Similar patterns of modification and partial infilling have been observed at sites such as Skara Brae and Stonehenge, where construction, reuse, and transformation occurred over extended periods. These examples suggest that the deliberate alteration and closure of built spaces are not isolated but form part of a broader pattern of human interaction with constructed environments.

In this context, it is essential to distinguish between natural subterranean formations and spaces modified or organized by human intervention. The present study treats the Ravne tunnel system as a constructed or intentionally modified environment based on observable archaeological criteria, including the geometry of passages, stratigraphic relationships, and the presence of architectural features such as dry-stone walls. This classification is based on material evidence rather than on assumptions regarding function or chronology.

The Ravne tunnel system represents an extensive network of subterranean passages developed within Quaternary conglomerate formations. Systematic archaeological investigations conducted between 2006 and 2025 have documented more than two kilometers of cleared passages, along with a complex sequence of stratified deposits, dry-stone walls, and architectural modifications. Within this system, large volumes of backfill material—primarily pebbles, sand, and rubble—have been identified as anthropogenic based on stratigraphic relationships and material characteristics. Stratigraphic profiles reveal sharp boundaries between natural geological layers and introduced material, indicating controlled deposition rather than gradual natural accumulation (Osmanagich, 2026a; Osmanagich, 2025b) (Figs. 1 and 2).

The interpretation of the Ravne passages as constructed or deliberately modified spaces is based on several lines of evidence. These include the consistent morphology of tunnel corridors, the presence of intersections and chambers with defined spatial organization, and the occurrence of structural elements not attributable to natural processes. In particular, the repeated documentation of dry-stone walls within the system, often positioned across passageways, is consistent with intentional architectural intervention.

These observations indicate that the Ravne tunnel system underwent multiple phases of use, modification, and closure. The scale and organization of backfilling, spanning considerable distances within the underground network, suggest a sustained and structured process rather than isolated activity. Previous analyses have emphasized the stratigraphic complexity of these deposits and their association with architectural features, supporting the interpretation of repeated anthropogenic intervention (Osmanagich, 2026a; Osmanagich, 2026c).

Alternative explanations for the observed deposits, such as natural collapse, water transport, or gradual sediment accumulation, were considered during analysis. However, several characteristics of the Ravne infill are not consistent with known natural depositional processes. These include complete filling from floor to ceiling within enclosed passages, sharp boundaries between the natural substrate and introduced material, and variability in composition and compaction within the infill. While natural processes may

contribute to localized sedimentation, the overall pattern observed across the system is more consistent with controlled deposition.

This study examines the phenomenon of deliberate closure through a comparative analysis of distinct archaeological contexts: the Ravne tunnel system in Bosnia and Herzegovina and selected examples of subterranean or enclosed structures exhibiting comparable patterns of infilling and transformation. The analysis includes reference to sites such as Göbekli Tepe (Turkey), Hal Saflieni Hypogeum (Malta), and underground systems in Austria, representing different geological and cultural settings.

The approach adopted in this study is analytical and comparative. It does not seek to establish direct cultural or chronological connections between the sites, but instead focuses on identifying shared material patterns of closure, including stratigraphy, deposit composition, spatial organization, and associated architectural features. By examining these elements, the study aims to situate closure within a broader anthropological and geoarchaeological framework.

This paper evaluates the deliberate closure of constructed spaces as a form of human activity, using the Ravne tunnel system as a primary case study within a broader comparative perspective. In doing so, it contributes to a more systematic understanding of how built environments are intentionally transformed at the end of their use-life and how such processes can be recognized, documented, and interpreted in the archaeological record.

## 2. Materials and methods

### 2.1. Study area and data Sources

The primary dataset for this study derives from systematic archaeological investigations conducted within the Ravne tunnel complex in the Visoko Valley, Bosnia and Herzegovina, between 2006 and 2025 (Figs. 1 and 2). Fieldwork included excavation, clearing of backfilled passages, stratigraphic recording, and documentation of architectural features, including dry-stone walls and tunnel morphology.

All observations were recorded through standard archaeological field procedures, including stratigraphic profiling, photographic documentation, and spatial mapping of tunnel segments and features. Particular attention was given to the identification of contact between natural geological substrates and introduced materials, as well as to the spatial distribution of architectural elements within the tunnel system.

Comparative data were obtained from published archaeological reports and secondary literature on subterranean and enclosed structures at selected sites, including Göbekli Tepe (Turkey), the Hal Saflieni Hypogeum (Malta), and underground systems in Austria. These sites were selected based on the availability of documented evidence for structural infilling, closure, or transformation processes.

### 2.2. Excavation and Recovery Procedures

Excavation within the Ravne tunnel system was conducted manually due to the confined nature of the passages and the composition of the backfill material. Sediments were removed in controlled layers, with attention to changes in color, texture, compaction, and clast composition.

Where appropriate, excavated sediment was manually screened to recover smaller artifacts and ecofacts. Mesh sizes varied depending on sediment composition and excavation conditions, typically ranging between 5 mm and 10 mm. While recovery procedures were consistently applied within individual excavation campaigns, variations in sediment compaction, moisture content,

and accessibility across sectors influenced the degree of material recovery. These factors are considered when interpreting assemblage composition.

Stratigraphic relationships were recorded by identifying distinct depositional units, including natural geological layers and anthropogenic infill. Profiles were documented to capture transitions between these units, particularly where sharp boundaries or intrusive relationships were observed.

### 2.3. Criteria for Identifying Anthropogenic features

The identification of anthropogenic features within the Ravne tunnel system was based on a set of observable criteria derived from archaeological and geoarchaeological practice. These criteria include:

- Clear stratigraphic discontinuities between natural geological formations and introduced materials.
- Presence of structured stone arrangements, including dry-stone walls composed of size-selected clasts.
- Spatial organization of tunnel passages, including consistent geometry, intersections, and chamber-like expansions.
- Evidence of repeated architectural interventions, such as multiple wall constructions within a single passage.
- Material contrasts between infill deposits and the surrounding conglomerate, including differences in composition, sorting, and compaction.

These criteria are applied in combination rather than individually, allowing for distinguishing natural depositional processes from patterns consistent with human modification. Interpretations are therefore based on the convergence of multiple lines of evidence rather than on single observations.

### 2.4. Stratigraphic and Sediment analysis

Stratigraphic analysis focused on identifying depositional sequences within the tunnel system, with particular attention to the relationships between the walls and the surrounding fill material. Observations included the vertical and lateral extent of infill, the presence of layering or heterogeneity within deposits, and the nature of contacts between units.

Sediment characteristics were assessed macroscopically, including grain size distribution, clast shape, sorting, and compaction. Differences between infill material and in situ conglomerate were used as indicators of depositional processes. While detailed micromorphological and granulometric analyses were not conducted within the scope of this study, macroscopic observations provide a basis for distinguishing between natural and anthropogenic deposits.

### 2.5. Chronological data

Chronological data associated with the Ravne tunnel system were obtained through radiocarbon ( $^{14}\text{C}$ ) and Uranium-Thorium (U-Th) dating of materials recovered from stratigraphic contexts within the tunnels. Radiocarbon analyses were conducted on organic samples, including charcoal and speleothem-related material, while U-Th dating was applied to stalagmites formed on exposed tunnel surfaces. (Osmanagich, 2026d)

These analyses were performed by independent laboratories, including the Kyiv Radiocarbon Laboratory and the TÜBİTAK Marmara Research Center. The resulting dates provide chronological

constraints for phases of human activity and environmental processes within the tunnel system.

It is important to note that these dates do not directly establish the timing of the initial tunnel excavation or construction. Instead, they provide minimum and contextual age constraints for the use, modification, and closure of subterranean spaces.

### 2.6. Comparative Analytical framework

The comparative component of this study is based on published descriptions of selected archaeological sites exhibiting evidence of infilling, closure, or transformation of constructed spaces. Rather than attempting to establish direct connections between sites, the analysis focuses on identifying shared material patterns.

Comparative criteria include the presence of intentional infill deposits, architectural blocking elements, stratigraphic sequencing of closure events, and spatial organization of subterranean or enclosed structures. Differences in geological context, construction techniques, and cultural setting are taken into account when evaluating similarities and contrasts between sites.

## 3. Results

### 3.1. Lithic Assemblage Overview

The lithic assemblage documented within the Ravne tunnel system consists of approximately 1,100 stone objects recovered from both surface contexts and subsurface tunnel excavations. The assemblage is dominated by sandstone, with occasional conglomerate and other lithologies.

Approximately 80 objects (around 7% of the total assemblage) derive from subsurface contexts within the Ravne tunnels, while the remaining material was collected from surface localities in the broader Visoko region. These differences in recovery context are taken into account in subsequent interpretation.

The objects vary in size, morphology, and degree of surface modification. A subset of the assemblage exhibits features such as smoothing, edge rounding, and linear markings.

### 3.2. Contextual distribution

Lithic objects recovered from subsurface contexts are associated with stratified deposits within the tunnel system, including layers of backfill material and areas adjacent to dry-stone walls. In contrast, the surface lacks a clear stratigraphic association.

Subsurface materials are therefore considered more reliable for contextual interpretation, although many derive from mixed or redeposited tunnel-fill deposits. This distinction is considered when evaluating potential chronological and functional interpretations.

### 3.3. Macroscopic Observations

Macroscopic analysis of selected lithic objects identified several recurring features, including smoothed surfaces, possible percussion marks, and linear grooves. These features are present on both complete and fragmentary specimens.

Such characteristics are consistent with patterns observed in anthropogenically modified stone assemblages, although similar features may also arise through natural processes such as abrasion or transport. Consequently, identification of human modification is based on a combination of multiple traits rather than a single attribute.

### 3.4. Stratigraphic Relationships

Stratigraphic observations within the Ravne tunnel system reveal a consistent pattern of layered deposits, including natural conglomer-

ate formations and overlying or intrusive infill material (Figs. 3 and 4).

In several cases, dry-stone walls are positioned across passageways and are directly associated with backfill deposits (Figs. 5–7).

Profiles documented during excavation show sharply defined boundaries between consolidated conglomerate and introduced material, as well as evidence of successive depositional phases. In multiple locations, walls are situated behind or within backfilled sections, indicating that construction and infilling are stratigraphically related processes.

The distribution of fill material within enclosed passages, often extending from floor to ceiling, and the presence of heterogeneous layers with varying composition and compaction, are not consistent with gradual natural sedimentation processes alone.

### 3.5. Architectural features

A total of 85 dry-stone walls have been documented within the Ravne tunnel system, including 64 in the Ravne tunnels, 5 in Ravne 3, 4 in Ravne 4, and 12 in Ravne 6. These walls are typically constructed from locally available stone, often sorted by size and stacked without mortar (Figs. 5–7).

The repeated occurrence of these structures at regular intervals, combined with consistent construction techniques, is consistent with deliberate architectural intervention within the tunnel system. In several cases, walls appear to function as barriers separating open passages from backfilled sections.

### 3.6. Chronological data

Radiometric data obtained from the Ravne 3 sector provide additional chronological context for the observed stratigraphic relationships (Figs. 8 and 9). Radiocarbon dating of organic samples analyzed at the Kyiv laboratory yielded ages ranging from approximately 3880 ±55 BP to 2540 ±50 BP, indicating environmental and depositional phases consistent with the Late Neolithic to Bronze Age periods.

Independent radiocarbon analysis of charred organic material recovered from a dry-stone wall conducted at the TÜBİTAK Marmara Research Center, yielded a calibrated date of 4th-century CE, indicating a later phase of human activity within the tunnel system.

These results demonstrate that the Ravne tunnel system underwent multiple phases of human activity and environmental stabilization over an extended temporal range. While these dates do not directly establish the timing of tunnel excavation, they provide important chronological constraints for the use, modification, and closure of subterranean spaces.

### 3.7. Summary of Observations

The combined stratigraphic, architectural, and lithic evidence from the Ravne tunnel system indicates a complex sequence of depositional and structural processes. The presence of repeated dry-stone walls, stratified backfill deposits, and lithic materials that may have been modified suggests multiple phases of activity within the system.

While individual lines of evidence may be subject to alternative explanations, the convergence of stratigraphic, architectural, and material observations is consistent with structured modification of subterranean passages. These observations form the basis for the comparative and interpretative analysis presented in the following section.

## 4. Comparative analysis

The phenomenon of deliberate closure or structured infilling of constructed spaces has been documented in a variety of archaeological

contexts. To situate the observations from the Ravne tunnel system within a broader framework, this section examines selected examples of subterranean or enclosed structures where comparable processes of infilling, blocking, or spatial transformation have been identified.

The comparative analysis is based on a set of defined criteria, including: (1) the presence of intentional infill deposits, (2) the use of architectural blocking elements, (3) stratigraphic evidence for phased closure, and (4) spatial organization of enclosed or subterranean structures. These criteria enable a systematic comparison of sites with differing geological and cultural contexts.

### 4.1. Göbekli Tepe (Turkey)

At Göbekli Tepe, a Pre-Pottery Neolithic site in southeastern Turkey, circular megalithic enclosures were systematically filled with heterogeneous material following their use. Excavations have revealed that these structures were intentionally backfilled with a mixture of stone debris, sediment, and cultural material.

Stratigraphic evidence at the site indicates that infilling occurred in discrete phases rather than through gradual natural accumulation. The composition of the fill, including deliberately placed elements and mixed deposits, has been interpreted as the result of intentional human action.

While Göbekli Tepe differs significantly from Ravne in terms of construction technique, chronology, and cultural context, both sites exhibit evidence of structured infilling and transformation of built spaces. In both cases, the presence of heterogeneous fill material, combined with clear stratigraphic boundaries, is consistent with deliberate modification rather than passive abandonment (Figs. 10 and 11).

### 4.2. Hal Saflieni Hypogeum (Malta)

The Hal Saflieni Hypogeum represents a subterranean complex carved into limestone bedrock and dating to the Neolithic period. The site includes multiple chambers and passageways, some of which exhibit partial infilling or restricted access.

Although the Hypogeum differs from Ravne in that it is entirely excavated in bedrock rather than developed within conglomerate, both sites exhibit controlled spatial organization and localized modification of access points. In the Hypogeum, architectural features such as doorways, niches,

and blocked passages suggest deliberate management of movement and space within the underground complex.

These features are not directly equivalent to the dry-stone walls observed at Ravne, but they represent functionally comparable forms of spatial control and modification.

### 4.3. Subterranean systems in Austria

Subterranean passages documented in parts of Austria and Central Europe consist of narrow tunnels and chambers excavated in various geological contexts, including compacted sediments and softer rock formations. Some of these systems exhibit evidence of blocking or partial infilling, often interpreted as measures related to access control or abandonment.

In contrast to Ravne, where dry-stone walls are constructed within a conglomerate matrix, Austrian systems are typically carved directly into more homogeneous geological substrates. This distinction is important when evaluating depositional processes, as the behavior of unconsolidated or semi-consolidated materials differs from that of carved bedrock.

Despite these geological differences, both contexts demonstrate the use of structural elements to modify or restrict access within

subterranean spaces, suggesting that closure or segmentation is a recurring feature of underground architecture.

#### 4.4. Ravne Tunnel system in Comparative Context

The Ravne tunnel system differs from the comparative sites in several key respects, including its geological setting, construction characteristics, and the scale of observed backfilling. The tunnels are developed within Quaternary conglomerate formations, consisting of naturally deposited gravel, sand, and cemented matrix.

This geological context is significant because it allows identification of introduced material through contrasts in composition, sorting, and compaction between natural conglomerate and backfill deposits. In multiple sections of the Ravne system, these contrasts are clearly observable in stratigraphic profiles.

The presence of 85 documented dry-stone walls within the system represents a distinctive architectural feature. These structures are typically positioned across passages and are associated with backfilled sections.

The repeated occurrence, consistent construction technique, and spatial distribution of these walls are consistent with deliberate placement. Their association with stratified infill deposits further suggests that they form part of a structured sequence of modification within the tunnel system.

#### 4.5. Synthesis of Comparative Observations

Across the sites examined, several common patterns emerge. These include the presence of infill deposits that differ from the surrounding material, the use of architectural elements to modify or restrict space, and stratigraphic evidence of the phased transformation of constructed environments.

At the same time, important differences must be acknowledged, particularly regarding geological context, construction methods, and cultural setting. The Ravne tunnel system, developed within a conglomerate, presents a distinct case in which anthropogenic modification must be distinguished from natural depositional processes within a semi-consolidated matrix.

Rather than suggesting direct equivalence between sites, the comparison highlights recurring patterns of spatial transformation and closure in human-modified environments. The evidence from Ravne is therefore interpreted within this broader framework, as a case exhibiting characteristics consistent with structured modification and possible deliberate closure.

### 5. Discussion

The results presented in this study indicate that the Ravne tunnel system exhibits a combination of stratigraphic, architectural, and material characteristics that are consistent with structured modification of subterranean spaces. The presence of repeated dry-stone walls, stratified backfill deposits, and lithic materials that may have been modified suggests that the system underwent multiple phases of use and transformation.

The stratigraphic relationships observed within the tunnel system, particularly the association between constructed walls and overlying or adjacent infill deposits, indicate that architectural intervention and deposition were part of a coordinated sequence of activities. These patterns are not readily explained by isolated natural processes alone, although localized natural contributions cannot be entirely excluded.

Radiometric data further support the interpretation of a multi-phase system. Radiocarbon and Uranium-Thorium dating of associated materials indicate that the tunnel environment has

experienced episodes of human activity and environmental stability spanning several millennia.

Importantly, this chronological data provides constraints on phases of use and modification rather than direct evidence for the initial excavation of the tunnels. The presence of speleothem formations over structural elements establishes minimum ages for certain features, while radiocarbon dates from organic materials indicate later periods of human interaction within the system.

The repeated occurrence of dry-stone walls across multiple sectors of the tunnel network represents a key line of evidence. These structures exhibit consistent construction techniques, including the selection and arrangement of stones without mortar.

Such regularity in construction, combined with their spatial positioning across passages and their association with backfilled sections, is consistent with deliberate placement. While natural processes may produce accumulations of stone, the organized and repeated nature of these features is not consistent with known patterns of natural deposition.

The comparison with other archaeological sites demonstrates that deliberate closure or structured infilling is a recurring phenomenon in human-modified environments. At Göbekli Tepe, for example, enclosures were systematically backfilled following their use, while at other sites, such as Hal Saflieni and subterranean systems in Central Europe, architectural features were used to control access or modify space.

These comparisons do not imply direct cultural or chronological connections but highlight that the intentional transformation of built environments, including closure, is a documented aspect of human behavior. The Ravne tunnel system can therefore be considered within this broader framework of spatial modification.

At the same time, the Ravne system presents specific interpretational challenges due to its geological context. The tunnels are developed within conglomerate formations, where natural processes such as sediment movement, water transport, and partial collapse may contribute to the formation of deposits.

However, the combination of features observed - complete filling of passages, sharp stratigraphic boundaries, variability in material composition, and the presence of repeated architectural barriers—is not readily explained by these processes alone. The evidence is therefore interpreted as consistent with controlled deposition and modification within the tunnel system.

It is important to acknowledge the limitations of the present study. Detailed micromorphological, granulometric, and mineralogical analyses of infill material were not conducted, and direct dating of the backfill deposits remains limited by the availability of suitable organic material. Future research incorporating these methods would provide further insight into depositional processes and chronology.

Taken together, the available evidence suggests that the Ravne tunnel system underwent a sequence of modifications that may have included deliberate closure events. These processes likely occur over an extended period and may reflect changing patterns of use, access, and environmental conditions.

Rather than representing a single phase of activity, the Ravne tunnels appear to document a complex history of interaction between human intervention and natural processes. The interpretation of deliberate closure is therefore presented as a working hypothesis supported by multiple lines of evidence, which can be further tested through additional analytical approaches.

The interpretation presented here is based strictly on observable material and stratigraphic relationships and does not depend on

**Table 1.** Comparative characteristics of closure processes at the Ravne Tunnel System and Göbekli Tepe

| Parameter           | Ravne Tunnel System (Bosnia and Herzegovina) | Göbekli Tepe (Turkey)                           |
|---------------------|----------------------------------------------|-------------------------------------------------|
| Context             | Subterranean tunnel network                  | Surface monumental enclosures                   |
| Chronology          | Multi-period (investigated 2006–2025)        | Pre-Pottery Neolithic (10th–9th millennium BCE) |
| Type of closure     | Backfilling + structural sealing             | Backfilling                                     |
| Fill composition    | Pebbles, sand, rubble                        | Stone fragments, soil, cultural debris          |
| Fill extent         | Complete (floor to ceiling)                  | Complete enclosure infill                       |
| Structural elements | Dry-stone walls blocking passages            | Limited structural sealing                      |
| Stratigraphy        | Multi-layered, discontinuous, multi-phase    | Repeated enclosure infilling phases             |
| Closure pattern     | Sequential (section-by-section)              | Cyclical (construction–use–burial)              |
| Scale               | Kilometers of tunnels                        | Multiple large enclosures                       |
| Interpretation      | Controlled closure of underground space      | Monumental closure/transformation of space      |

assumptions regarding broader cultural narratives or sitewide interpretations.

Taken together, these observations support the identification of closure as a recurring pattern of human behavior, expressed through different material strategies but recognizable through consistent archaeological indicators.

## 6. Conclusion

This study has examined the phenomenon of closure and infilling in subterranean environments through a detailed analysis of the Ravne tunnel system and a comparative review of selected archaeological sites. The results demonstrate that the Ravne tunnels exhibit a combination of stratigraphic, architectural, and material characteristics consistent with structured modification of subterranean spaces.

The presence of repeated dry-stone walls, stratified backfill deposits, and lithic materials with possible signs of modification indicates that the system underwent multiple phases of use and transformation. Stratigraphic relationships between walls and infill deposits suggest that architectural intervention and deposition were part of a coordinated sequence of activities, rather than isolated or purely natural processes.

Radiometric data derived from associated materials provides a chronological framework indicating that the tunnel environment experienced episodes of human activity and environmental stabilization over an extended temporal range. These data establish minimum and contextual age constraints for phases of use and modification, although they do not directly date the initial excavation of the tunnels.

The comparative analysis demonstrates that processes of deliberate infilling, closure, and spatial transformation are documented in diverse archaeological contexts, including Göbekli Tepe, the Hal Safljeni Hypogeum, and subterranean systems in Central Europe. While these sites differ in geological setting, construction techniques, and cultural context, they share patterns of structured modification that provide a broader framework for interpreting the Ravne evidence.

At the same time, important differences must be acknowledged, particularly regarding geological context and preservation conditions. The Ravne tunnel system, developed within conglomerate formations, presents a distinct case in which anthropogenic modification must be evaluated alongside natural depositional processes.

Taken together, the available evidence supports the interpretation that the Ravne tunnel system underwent phases of structured modification, including deliberate closure events. This interpretation is based on the convergence of stratigraphic, architectural, and material observations.

However, further research is required to refine the chronological framework and to better understand the processes involved.

Future work incorporating micromorphological analysis sediment characterization, and additional radiometric dating would provide important insights into the formation and transformation of the tunnel system.

This study contributes to a broader understanding of how subterranean environments are modified and transformed over time. By emphasizing the role of closure and infilling as active processes throughout the life cycle of built environments, it underscores the importance of integrating stratigraphic, architectural, and geoarchaeological data into archaeological interpretation.

## ■ ACKNOWLEDGEMENTS

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## ■ PERMISSIONS

All necessary permissions for archaeological research and excavation were obtained from the relevant authorities.

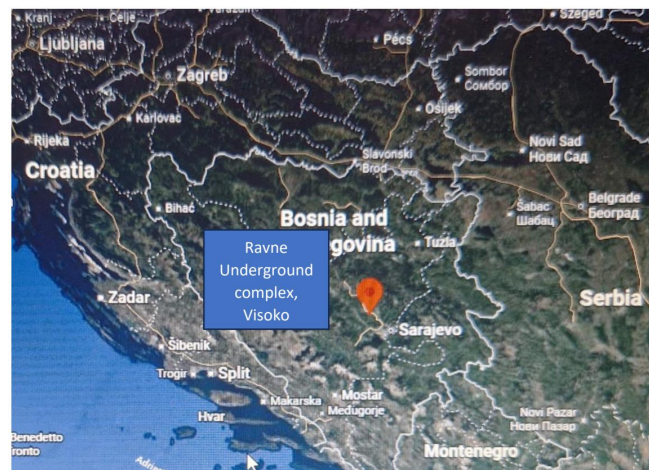
## ■ USE OF ARTIFICIAL INTELLIGENCE (AI) STATEMENT

The author used artificial intelligence (AI) tools to assist with language refinement, structural editing, and manuscript formatting. The AI support was limited to improving clarity, grammar, and organization of the text. All scientific content, interpretations, data analysis, and conclusions presented in this study were developed solely by the author based on original research and fieldwork. The author takes full responsibility for the accuracy, integrity, and originality of the work.

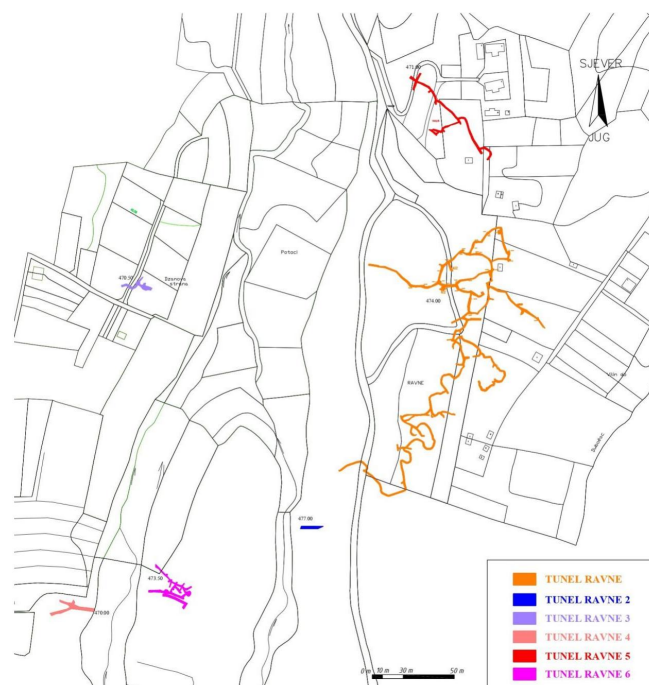
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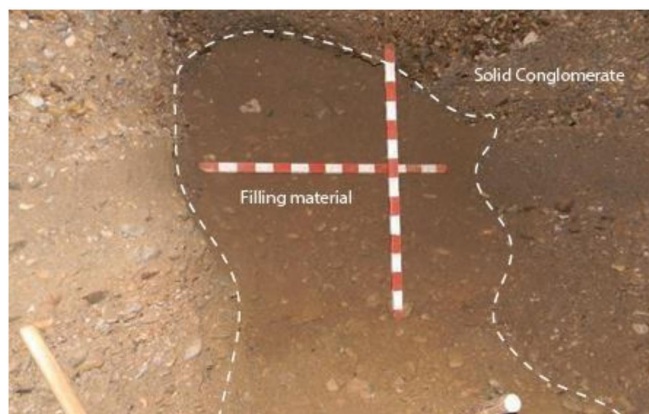
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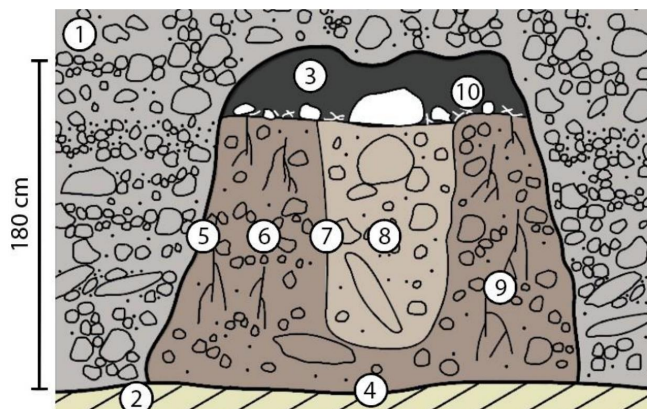
**Figure 1.** Location of the Ravne underground complex in the Visoko region, central Bosnia and Herzegovina, and its position within the broader Balkan region.



**Figure 2.** Plan of the Ravne tunnel system indicating the spatial distribution of explored passages (Ravne 1–6) and the extent of the subterranean network documented during archaeological investigations.



**Figure 3.** Section of tunnel fill shows a clear distinction between natural conglomerate and anthropogenic infill material; the boundary between compact geological substrate and loose sediment demonstrates intentional deposition.



**Figure 4.** Schematic stratigraphic profile of a tunnel section illustrating the relationship between natural conglomerate layers and introduced backfill deposits, including internal organization and layering of infill material.



**Figure 5.** Tunnel passage completely filled with sediment from floor to ceiling, representing full spatial closure through deliberate backfilling.



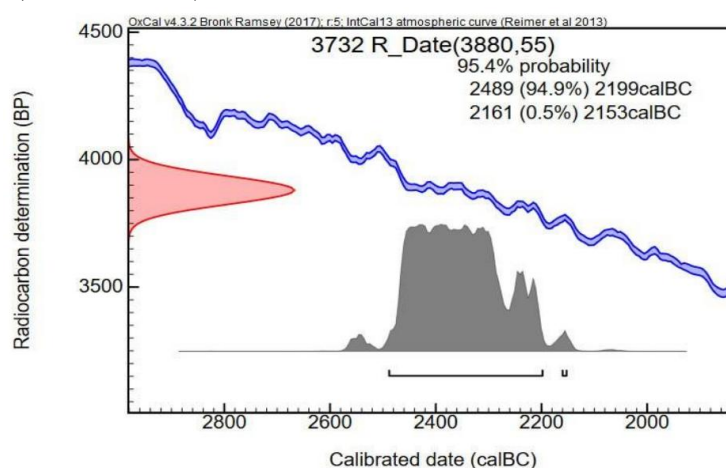
**Figure 6.** Dry-stone wall constructed within a tunnel passage, composed of river pebbles and used to block or stabilize a sealed section of the underground network.



**Figure 7.** Dry-stone wall revealed after removal of overlying backfill material, demonstrating the sequential relationship between infilling and structural sealing within the tunnel system.

| Lab No. | Sample Description | Benzene (g) | pMC (%) | Age (years BP) |
|---------|--------------------|-------------|---------|----------------|
| 3729    | S001 Layers (B+C)  | 1.3853      | 64.5    | 3520±50        |
| 3730    | S001 Layers (A)    | 0.6940      | 72.9    | 2540±50        |
| 3732    | S001 Layer (C)     | 1.2285      | 61.7    | 3880±55        |
| 3733    | S2-018             | 1.3183      | 68.3    | 3070±50        |

| Замовник(Customer)                              | Foundation "Archaeological park "Bosnian Pyramid of the Sun" |
|-------------------------------------------------|--------------------------------------------------------------|
| Зразок(Sample):                                 | Sample S001 (Carbonate, Layer C)                             |
| Код лабораторії (lab code)                      | ІНМЕ-3732                                                    |
| Маса бензолу (benzene mass)                     | 1,2285                                                       |
| Час вимірювання (counting time)                 | 3000                                                         |
| Швидкість лічення проби (Sample count rate)     | 7.609                                                        |
| Фон (імп./хв.) (Background count rate)          | 0.546                                                        |
| Ефективність реєстрації (counting efficiency) : | 73,61%                                                       |
| Радіовуглецева дата (Radiocarbon date)          | <b>3880 ± 55</b>                                             |
|                                                 | <b>BP</b>                                                    |



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**Figure 8.** Radiocarbon dating results of organic samples from Ravne 3 tunnel system (Kiev laboratory).

| Report no                                                                                                                                                                                                                                                                                                                                         | : 29109288-125.05-4286/29282                                                                                   |                       |                      |             |                |                                                     |
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| Requested by                                                                                                                                                                                                                                                                                                                                      | : Dr. Sam Osmanagich                                                                                           |                       |                      |             |                |                                                     |
| Address                                                                                                                                                                                                                                                                                                                                           | : Archaeological Park: Bosnian Pyramid of The Sun Foundation - Ravne BB,71300<br>Visoko Bosnia And Herzegovina |                       |                      |             |                |                                                     |
| Sample                                                                                                                                                                                                                                                                                                                                            | : Sample type given in table                                                                                   | Barcode No            | : 23T0001363         |             |                |                                                     |
| Number of samples                                                                                                                                                                                                                                                                                                                                 | : 1                                                                                                            | Expiry date           | :                    |             |                |                                                     |
| Sample handling                                                                                                                                                                                                                                                                                                                                   | : Courier                                                                                                      | VP sample register no | : 23T/1363           |             |                |                                                     |
| Condition of sample at reception                                                                                                                                                                                                                                                                                                                  | : Suitable                                                                                                     | Acceptance date       | : 05/03/2024         |             |                |                                                     |
|                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                | Date of the analysis  | : 29/03/2024         |             |                |                                                     |
| Information on retention samples:                                                                                                                                                                                                                                                                                                                 |                                                                                                                |                       |                      |             |                |                                                     |
| ( ) Sample returned to the customer ( ) Retention sample available ( x ) Retention sample is not taken                                                                                                                                                                                                                                            |                                                                                                                |                       |                      |             |                |                                                     |
| Item No                                                                                                                                                                                                                                                                                                                                           | Lab. No:                                                                                                       | Customer No:          | Radiocarbon Age (BP) | Sample Type | Pretreatment   | Calendar Calibration (2 $\sigma$ )                  |
| 1                                                                                                                                                                                                                                                                                                                                                 | TÜBITAK - 3259                                                                                                 | S001                  | 1677±23              | Charcoal    | Acid-Base-Acid | 261 - 278 cal AD (%9,7)<br>340 - 423 cal AD (%85,8) |
| Radiocarbon Age (BP): Measured radiocarbon age corrected for isotopic fractionation using AMS measured delta <sup>13</sup> C.                                                                                                                                                                                                                     |                                                                                                                |                       |                      |             |                |                                                     |
| Measurement System: National Electrostatics Corporation, Model 3SDH-1 (UAMS)                                                                                                                                                                                                                                                                      |                                                                                                                |                       |                      |             |                |                                                     |
| Reference:                                                                                                                                                                                                                                                                                                                                        |                                                                                                                |                       |                      |             |                |                                                     |
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| Notes:                                                                                                                                                                                                                                                                                                                                            |                                                                                                                |                       |                      |             |                |                                                     |
| <ul style="list-style-type: none"> <li>The results in this report are valid only for the analysis of subsample taken from the submitted sample.</li> <li>*BP: Before Present - AD 1950.</li> </ul>                                                                                                                                                |                                                                                                                |                       |                      |             |                |                                                     |
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**Figure 9.** Radiocarbon dating of charred organic material from dry-stone wall, Ravne 3 (TÜBITAK laboratory).



**Figure 11.** Excavated enclosure at Göbekli Tepe showing architectural elements embedded within infill deposits, illustrating the process of deliberate burial.



**Figure 10.** General view of a monumental enclosure at Göbekli Tepe, showing circular layout and T-shaped limestone pillars prior to complete excavation.



## Altai-Tarbagatai Region in the XIII-XIV Centuries (based on the Writings of Guillaume de Rubruck and Plano Carpini)

### Article Record

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### Abstract

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ARCHIVAL RECORD

# Altai-Tarbagatai Region in the XIII-XIV Centuries (based on the Writings of Guillaume de Rubruck and Plano Carpini)

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## Abstract

The Altai-Tarbagatai region occupied an important strategic and political position within the medieval Mongol world during the XIII-XIV centuries. This study investigates the historical geography of the region on the basis of the travel accounts of Giovanni da Pian del Carpine and William of Rubruck, combined with Kazakh historical traditions, toponymic evidence, and ethnographic data. Particular attention is devoted to identifying the possible locations of the palaces, hordes, and seasonal residences of the descendants of Genghis Khan, especially the domains of the Ogedei and Jochi dynasties in Eastern Saryarka, Altai, Tarbagatai, and the Irtysh basin. The article further analyzes the role of ancient communication networks, including caravan, military, and diplomatic routes such as the Bukhtarma road, which connected Central Asia, Siberia, and China. Comparative examination of medieval narratives with later Kazakh socio-political geography demonstrates the continuity of nomadic settlement systems and dynastic territorial traditions across centuries. The study concludes that the accounts of medieval travelers provide significant evidence for reconstructing the political landscape, migration patterns, and communication systems of the Mongol and post-Mongol era in East Kazakhstan.

**Keywords:** *Genghis Khan, Orda Yezhen, Kuyuk Khan, Karpini, Rubruk, Atkinson, Altai, Tarbagatai, Chingistau, Irtysh, Ayagoz, Bukhtarma, Zaisan, caravan, trail*

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## 1. Introduction

The Kazakh population has long distinguished its habitats by geographical names: Saryarka, Zhetysu, Syrdarya, Altai, Ush Kiyan, etc. (kiyan is a noun in the Kazakh language, meaning a very distant, remote, hard-to-reach place). You can easily see by examining the history of the states and uluses that took place in this area that these geographical names are not unreasonable, they all have not only geographical, but also historical features.

Without going into early history, looking at the times of the Golden Horde, one can make sure that the land of Saryark belonged to the Ak Horde (the left wing of the Golden Horde), the Land of Zhetysu belonged to Chagatai, and the Land of Altai belonged to ulus of Ugedey (Ulus is a historical term of Mongolian origin meaning "people", "state" or "lot"). Of course, the territories covered by these states went beyond the borders of today's territory of Kazakhstan. However, the political centers (Residence) of these three uluses were located on Kazakh soil. The Kazakh tribes themselves were classified according to these geographical features, formed their own population, seasonal nomadic ways, therefore in our article we consider these regions as separate historical and geographical regions.

Today, in the Kazakh lands belonging to medieval history, there is one of the nodal places, the exact location of which still remains uncertain, that is, the confluence of these three uluses-east of Lake Balkhash and the system of lakes Alakol and Sasykkol.

If we explain the geographical feature, it is located at the junction of Eastern Saryarka, Northeastern Zhetysu and Western Altai (Alakol-Tarbagatai). In these parts, especially in eastern Saryarka and Altai, the Residence and palaces of the Jochi dynasty (Orda Yezhen) and the Ogedei dynasty are still uncertain. The article will focus on these hordes, palaces, as well as the ancient routes of communication (diplomatic, marching, caravan) that passed through these regions.

Undoubtedly, we find very valuable facts about the palaces of the aforementioned rulers in the travel notes of travelers like Plano Carpini (1245–1246) and Guillaume de Rubruck (1253–1256.) We have already mentioned the arrival of Rubruck on Kazakh soil in our previous article<sup>1</sup>. Therefore, we will immediately begin our conversation from the place where the route of these travelers sets foot in the lands we are writing about. The presence of this ancient route through Altai and Tarbagatai is also confirmed by later historical maps and travelers' descriptions (Fig.1).

The journey of the Carpini from the Emil River to the Ogedei Palace (compared to Rubruck) passed along the southern slopes of the Zhetysu Alatau and the Barlyk Mountains (the PRC (China) side, i.e. Talky Pass, Sairam-nor, Ebi-nor, Barlyk Mountains) along the Emil River. Because Carpini arrives in Alakol only after this river. If he had walked straight through the Dzungarian Gate without

<sup>1</sup>Look: Oshanov Orynbay. Ancient caravan routes of Western Saryarka // MAIASP. 2025 №20. 7–15 p.

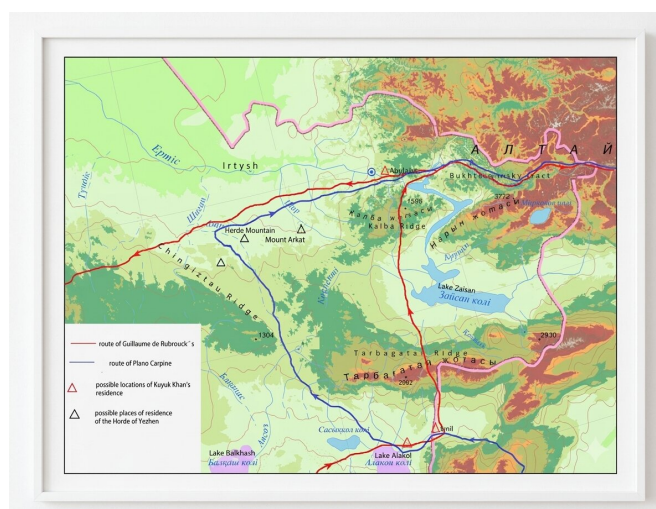


Figure 1. Altai-Tarbagatai region (East Kazakhstan)

bypassing the Barlyk Mountains, then obviously he would have been the first to see Zhalanashkol and Alakol.

Therefore, the settlement that Carpini describes as "the emperor built a New settlement here" should most likely be around today's settlement of Shaweshek.

The historian Kurbangali Khalid (1843–1913) says that in 1878, when the Chinese built Durbiljin Castle 65 kilometers east of Shaweshek, that is, along the Emil, the site of the old settlement was next to it [Khalid 1992: 42]. Khalid further suggests that this place of the settlement could be the horde of Kuyuk Khan. The last mention of the Ogodei Horde in historical sources is associated with the Tarbagatai campaign of Amir Temir. Amir Temir went on a campaign to these regions in 1389. After he caught up with Yenge Tore and reached Tarbagatai, on the way back he stops at Sarai Orda (Sarai Ordam) along Emil (Emil-Guchur) [Yazdi 2008: 134].

Carpini arrives at Lake Alakol after leaving the city along the Emil. He said about this lake: «On the shore of this sea, there is a certain small mountain, in which, as they say, there is a certain opening, from where in winter there are such strong storms with winds that people can hardly and with great danger pass by. In summer, the sound of the winds is always heard there, but as the residents told us, it comes out of the hole slightly» [Journeys., 1993: 64]. This is Abi's wind, which the locals are still very afraid of. The traveler Rubruck also told about this wind. He wrote: «Among the large mountains, a valley stretched in a southeasterly direction, and then there was another large sea between the mountains, and a river flowed through this valley from the first sea to the second; in this valley, such a strong wind blows almost continuously that people travel with great fear lest the wind carry them into the sea» [Journeys., 1993: 117].

Carpini writes that he spent several days circling this lake (Alakol) and was constantly on the left side of the lake [Travel, 1993: 64]. The fact that he describes that the lake was constantly to their left proves that they regularly traveled along the northern route. Next, he writes about his arrival on the territory of the Orda (Yezhen), describing the small rivers and waters he visited. Most likely, he arrived in the mountains of Chingistau, Orda or Arkat [Journeys, 1993: 64]. These data completely coincide with the medieval data that the Horde of Jochi Khan "was located near the Irtysh River". The mountains of Chingistau, Orda, and Arkat are located near the Irtysh.

Later, the Orda Yezhen and Batu choose Ulytau as a political center and move the main Horde there. In turn, Batu Khan, after the western campaigns, moved his horde to the Edil and the eastern lands from Ulytau to the Irtysh became the possessions of the Orda Yezhen and his other brethren (Ak Horde).

Carpini writes that he arrived in the "First Horde" of the Emperor (Kuyuk Khan) after staying on the land of Orda Khan. And here he is talking about another palace, that is, the palace of the Orda's father (Jochi). Rubruck, however, sees this emperor's palace only on the way back.

This suggests that their further journeys after Alakol were carried out in two separate ways (we will return to this later). Here we prefer to show where the palaces of Jochi Khan and the Orda Yezhen were located, and we want to show them in comparison with the possessions of the Kazakh rulers who lived in these parts in the XVIII–XIX centuries.

An additional proof in determining the hordes of Genghis Khan's descendants in the XIII century along the Irtysh, Altai-Tarbagatai, in our opinion, is an indication of the possessions of the Kazakh sultans who lived in these parts in the XVIII - XIX centuries. Since medieval times, Altai and Tarbagatai have been considered strategic and political regions of the Mongol world. This strategic importance has not decreased in the following centuries. Many of the descriptions given by Carpini and Rubruck in the 13th century about this region still coincide with the records of later times. For example, we see this clearly if we trace the route of the traveler Atkinson on the map of the 19th century.

Kazakh society retained the power of the Genghis Khan dynasty (Tyure - a Kazakh dynasty and historical elite class directly descended from Genghis Khan) until the middle of the 19th century. This tradition was abolished only on the basis of political reforms carried out by the Russian government.

In Kazakh society, the representatives of the ruling dynasty were the Tyure (Genghis dynasty), who ruled over the leaders of each tribe and occupied comfortable wintering grounds and fertile lands in these regions. The Chingistau range, the Orda and the Arkat Mountains in the region that we are writing about, that is, which Carpini points out, are among the most fertile places in Eastern Saryarka. Until the end of the XVIII century, Abulfeiz Khan and his descendants lived in these places. Towards the end of the XVIII century, after the death of Abilfeiz Khan, the children of Abylai Khan came to power in Chingistau and began to rule over the local tribes (Argyn - Tobykty), and then the "Aga Sultan" Kunanbai<sup>2</sup> owned these places, he was a representative of a commoner family. The descendants of Abulfeiz ruled the Naiman and Kerey tribes, who lived along the Altai-Tarbagatai and the Arkat Mountains adjacent to Chingistau.

As we wrote above, Saryarka was the land of the Ak Horde, belonging to the Golden Horde. Orda Yezhen and his dynasty ruled in the Saryarka region, stretching from Ulytau to the Irtysh, therefore, the land of the Horde, which the traveler Karpini writes about, should be located along the mountains of Chingistau, Orda and Arkat in Eastern Saryarka. If we look for a place, considering that the traveler Karpini, going north along the Emil, that is, from the Ogodei Horde, came to the headquarters of the Horde of Yezhen, then today we will find ourselves either on Mount Arkat, or on Mount Chingistau and Orda. Because these two possessions are the most fertile lands and, accordingly, the lands of the ruling representatives. Among them,

<sup>2</sup>Previously, according to tradition, the title "sultan" belonged to the Genghis dynasty, and on the basis of the reform of the Russian Empire, "Aga Sultan" was assigned to a special career position, and at that time representatives of ordinary Kazakh families could receive it.

Chingistau and Orda belong to the same economic zone. In the XIX century, these lands belonged to representatives of the Tobykty tribe. And in the vicinity of Mount Arkat were the possessions of Barak Sultan (a descendant of Abulfeiz Khan). That is, according to their status, these lands were "khan's reserves", such as Ulytau in Western Saryarka or the Kegen - Narynkol steppe in Semirechye.

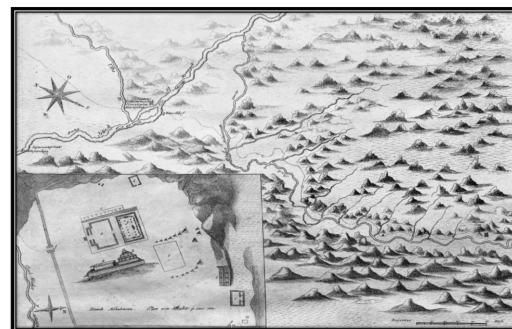
It is noteworthy that the name Chingistau, according to popular information, is associated with Genghis Khan. The information that the name Chingistau is associated with Genghis Khan is found for the first time in a note by the traveler Andreev. In 1782, he arrived in the Horde of Khan Abulfeiz Khan and, in between conversations, asked about the history of the mountain.

Andreev wrote about Abulfeiz Khan: «He had his own nomad or dwelling right in the Semipalatnaya fortress in the stone mountains of Chingistau, on the Chingiske River, which are 300 versts away from Semipalataya. About this amba, when I was with this saltan for some business about the embassy in 1782, out of curiosity, I asked between conversations: for what reason is this stone called after the great Genghis Khan? Who replied to me that in ancient times he, the great Genghis Khan, walked to this stone as his nomad, after which he received his name. And he, Abulfeiz-saltan, has been an indispensable nomad in this winter for more than forty years, but he migrates to different places in the summer» [Andreev 1998: 41–42].

The Kazakh poet Abai also writes about the connection of Chingistau with Genghis Khan. He wrote: «When Genghis Khan emerged from the Mongol tribes, the Kazakhs went to congratulate him. But where they went is unknown, but it was on Mount Genghis, on the Karaul river, that the army lay, twelve men from twelve tribes, according to the Mongols' own law, on the top of a great height "Khan", on a white felt, Genghis was placed on the throne» [Abai 2002: 156]. Abai's father Kunanbai also provided information of this nature to researcher A. Yanushkevich [Yanushkevich 1966: 27–28].

It is difficult to connect the origin of the name of Orda Mountain directly with the Orda Yezhen Khan. Nevertheless, from the geographical names "Orda", "Orda kongan", "Big Orda", "Small Orda", it can be assumed that their origin is connected with the place of settlement of the rulers. Judging by the fact that the traveler Carpini writes that he arrived "in the first Horde of the emperor," and visited the possession of the Orda Yezhen, it can be assumed that he went in an easterly direction, and he also notes that this palace was run by one of the emperor's wives (Kuyuk Khan) [Journeys., 1993: 64]. And the traveler Rubruck sees this palace only on the way back. This historical fact is not free to lead to the idea that "What if the place of this palace is located on the ground floor of the Abylaiet buildings, where the Kalmyk Taishi (a historical title denoting a tribal chief) Abylai lived in the 17th century?"

As we mentioned above, settlements are one of the constant moments in the life of nomadic Turkic - Mongolian peoples. For example, Ulytau land was the place of settlement of the Jochi Khan dynasty, including the descendants of the Orda Yezhen, as well as the Kazakh khans, and then in the second half of the 19th century, "Aga Sultan" Yerden Sandybaev, a native of the Baganaly tribe. Similarly, the Kegen - Narynkol steppes became the possessions of the Chagatai Khan and his dynasty, then the Kazakh khans (Yesim, Zhangir), then the Dzungarian rulers (Syban Raptan, Galdan Tseren, Dabashi). This suggests that the location of the Abylaiet settlement might be the site of one of Kuyuk Khan's palaces (Fig.2).



**Figure 2.** The plan of the sanctuary of Ablakit and the surrounding area. Map. From the book: Journey 1771. Part II. St. Petersburg, 1786. Book 2. Tab. XI

Arrival at the settlement of "Abylaiet" indicates that the traveler Karpini, after arriving in the possession of the Horde of Yezhen, went to the east side, and passed below the place where the city of Ust-Kamenogorsk stands today, arrived at the palace of Kuyuk Khan and then went along the Bukhtarma highway. And the traveler Rubruck joins the Bukhtarma road from the south side, that is, just below the place where Abylaiet stands.

The fact that he (considering that he saw Kuyuk Khan's Palace on the way back) writes that after the main residence of the ulus (the Ogedei Horde along the Emil) "went north to the snowy mountains" (the base is slightly northeast) indicates that these were the Tarbagatai Mountains. That is, the Rubruck through the Tarbagatai and Kalba ridges connects to the Bukhtarma tract along the current Bukhtarma reservoir. There are similar historical notes stating that Rubruk passed directly through the Tarbagatai and Kalba ranges. For example, he has such memories: «On the second Saturday of the Nativity Fast, in the evening, we passed through a place among very scary rocks, and our guide sent me to ask me to say some prayer words so that they could put the demons to flight, since at this crossing demons usually suddenly carried people away» [Journeys., 1993: 117]. A similar description can be found in the writings of the English traveler T. Atkinson. In 1848, he visited some places between the Irtysh and Tarbagatai, where he drew sketches of their paintings on paper.

Atkinson writes about one such place like this: «Then there were ruined towers and powerful battlements with siege towers reaching high up, on which I imagined, one might even say, clearly imagined gloomy guards vigilantly surveying the endless plains. If all this had been the time of the jinn, then, of course, they could have been discovered at this place» [Atkinson 2006: 153]. And he writes that the Kazakhs have always been afraid of these vengeance and called them "the abodes of Demons" [Atkinson 2006: 153]. Comparing this description of Atkinson with a note by Guillaume de Rubruck, written five hundred years ago, it can be seen that these two describe the same place.

The records of Carpini and Rubruck show that in the Altai - Tarbagatai region (today East Kazakhstan region) there were several palaces, hordes of descendants of Ogedei.

Small palaces are the place where the settlement of Abylaiet and the mouth of the Emil, which flows into the Alakol, stand, and the main one is the town of Sarai Orda along the Emil (China), built by Ogedei.

If we consider that the wives of the rulers sat in small palaces, this indicates that the tradition continued in the Turkic - Mongolian peoples until recent times. It was also considered common in Kazakh society that every Khan or Rich people's woman had her own village. There are many names of such villages in the toponyms and hydronyms of the Kazakh land. Some even tell humorous stories. For example, one of the big rivers of the Saryarka steppe is the Sarysu. The length of which is about 800 kilometers. According to legend, at the source of this river were the villages of Zhuban ana, in the center - Bolgan Ana, and at the end - Belen Ana. All three were the spouses of Grandfather Talmas. Talmas ata leaves Zhuban Ana's house every morning and has lunch at Bolgan Ana, and in the evening goes to Belen Ana (or vice versa). At the house of Bolgan ana, who lived in the middle house, he only had lunch. And then one day, breaking this habit, he left the house of Belen Ana and went to the house of Bolgan Ana and stayed there overnight. After Talmas ata did not come late at night, Zhuban ana got very angry, went to the river and urinated. Then this river was named Sarysu, that is, the color of the water changed to yellow due to the yellowish color of urine, that is, "sary su" in kazakh means "yellow water". Of course, this is a myth, although there are several notable points here. Secondly, these are not just women's names, the tombs of all three of them and Grandfather Talmas have been preserved to this day. It is noteworthy that all four building complexes belong to the monuments of the Golden Horde period. Thirdly, the names Bolgan Ana and Belen ana are found in the work of historian Rashid ad-Din among the names of the wives of the descendants of the Orda Yezhen. For example, the eldest child of the Orda Yezhen is a Kuli, the children of this Kuli are Tumakan and Mungkan (Myankan) and the names of their wives are "Bulugan Khatun" and "Bilan Khatun" [Rashid ad-Din: 45-46]. In addition, the Sarysu River, where the graves of these women are located, is located on the territory of Ak-Orda, it was the possession of the Orda Yezhen khan's.

Speaking from the point of view of the life of the nomadic Turkic - Mongolian peoples, there may be a winter campsite of the descendants of Ogedei downstream of the Emil and along the Alakol, as well as another wintering place in the area of Lake Zaisan. And the summer place of the Horde is located on Zhailau above the Altai - Tarbagatai mountains, so the places of spring (kokteu), summer (zhailau) and autumn (kuzek) the hordes are conventional places, with the exception of Ogedei's winter encampment (in general, in relation to another Genghisid dynasty).

The fact that the eastern coast of Alakol is an independent economic zone with the Tarbagatai range is evidenced by the nomadic ways of the Kazakh tribes of the XIX century.

In general, steppe life and everyday life are stable, i.e. a system in which traditional migration routes have been formed since ancient times due to the peculiarities of their surrounding nature. The tribe itself, which came from outside, eventually gets into this system, obeying its laws. The locals lead a nomadic lifestyle, their economy is dominated by nature.

A nomad only adapts to the environment and forms his own household, so it is clear that Ogedei and his dynasty's nomadic ways are subject to this system. The dense reed outer strip of Alakol is an indispensable winter destination for nomads. There were dense thickets of reeds, which served as a reliable shelter for cattle during winter snowstorms, and a variety of vegetation (young reeds, sandy reeds, turanga, tamarisk, willow bushes) served as food.

Due to the fact that dense thickets of reeds served as a shelter and to a certain extent served as a protective shield from the cold, people wintered in yurts, and also had easy access to winter fuel, since the reed stalks were used as firewood. For this reason, lands

such as Alakol have been the habitat of ruling dynasties or the rich for many centuries.

## 2. Communication routes of the Altai-Tarbagatai region

Let's briefly talk about the ancient Bukhtarman communication route along the Altai-Tarbagatai and its historical significance.

Altai-Tarbagatai Mountains today are a historical geographical region covering the territories of four states. Due to the fact that it is in itself a large geographical region consisting of mountain ranges, it was also of great strategic importance due to the complexity of the passages.

For this reason, the current situation has remained unchanged for centuries, since the ways of communication in this region depended only on narrow roads (paths). These paths had different meanings depending on the situation prevailing in different periods of time. In times of peace, trade caravans traveled along these roads, and during hostile periods, these routes instantly turned into military hiking routes.

One of the most important roads in the Altai-Tarbagatai region is the Bukhtarman road. The western segment of the main highway crossing the Altai Mountains from east to west (or in the opposite direction) is Bukhtarman. The eastern side of the road passes through the settlements of Sogak and Oygur and heads into the Kobda River.

Ancient Turkic records contain information about the campaigns of the Turks beyond the Altai Mountains to the Turgesh along the Irtysh. For example, the Kultegin writings contains the following information: «In the same year, we marched against the Turgesh, climbing into the Altun rabble and crossing the Irtysh River» [Malov 1951: 41]. They are also sent to Turgeshi in a Tonykok letter. It says: «And I say this, I am a wise Tonykok: "We came after passing through the Altun rabble. Across the Irtysh River» [Malov 1951: 68]. According to these records, they crossed the Irtysh River on this Bukhtarman road. Because all paths except it's are bypass roads.

Bukhtarman's path was first mentioned in the campaigns of Genghis Khan. In 1204, Genghis Khan wintered in the Southern Altai and moved to the western side in the spring. Historical notes write something like this: «Genghis Khan wintered on the southern slope of Altai. Then, in the spring, in the year of the Cow (1205), he crossed the Altai and moved on, the combined army of Tokht and Kuchuluk was standing ready at the headwaters of the Irtysh Bukh-durma» [Сокр.каз., 1941: 56]. This document records that Genghis Khan passed Altai through the "Arai Pass". About the course of the hike, about the Arai pass is indicated in it: «Returning from there through the same Arai pass, Genghis Khan camped in Auruta» [The Hidden legend., 1941: 56].

In general, the Bukhtarman road was one of the most crucial and continuously crossed paths in the western campaigns of Genghis Khan. In the last years of his life, he returns from western campaigns to Mongolia along this path. The note says that he spent the summer on the Irtysh and only then returned to Mongolia (1225) [The Hidden legend., 1941: 85]. The origin of the folk legend linking the Chingistau Mountains with Genghis Khan may be related to this year (1225).

Another important significance of the "Secret Chronicle" about Genghis Khan lies in the fact that this record for the first time mentions Lake Zaisan, which bears its former historical name "Kyzylbas".

Genghis Khan kills Buyruk Khan in this lake Kyzylbas (Zaisan). It's written like this: «§ 158. Then Genghis Khan and Wang Khan went together to Guchugudun-Burukh of Naimansky. Unable to

resist them, Burukh Khan moved across the Altai from the area of Sokh-usun to Ulukh-takh, where they overtook him. That's where they started chasing him. Then they crossed the Altai and drove downstream of the Khumshigir river Urunga. Here, our troops captured his son, Editubluh, who was on guard duty. Pressed by our guard squad, he tried to run into the mountains, but his horse's girth snapped. Having chased Burukh Khan down the Urung River, they overtook him at Lake Kishilbash-naur (our mark - O.O.) and then they finished him off" [The Hidden legend., 1941: 36].

The fact that the historical name of Zaisan is "Kyzylbas" is clearly reflected in the writings of Spafari. In 1675, the Russian ambassador Spafari traveled along the Irtysh River to China and on this trip gave the following information about Lake Kyzylbas (Zaisan): «In addition, it takes 9 days to reach Lake Kizilbash near the Irtysh River. And the Irtysh River passed through that lake and does not interfere with the lake and flows beyond the lake again» [Spafari 1882: 42].

Spassky explains it this way: «According to Fischer, this lake, formerly called Kizil-nor, was renamed Nor-Zaisan (Noble Lake) because of the abundance of fish in it, which, contrary to their custom, the Kalmyks ate during the famine in their country» [Spassky 1849: 14]. Fischer writes as follows: «It is said that the Kalmaks then ate fish from Nor-Zaisan when they needed it, although, however, such food was not in their habit, and the lake, which was formerly called Kizalsu-Nor, received its current name out of gratitude for its services, as they would like to welcome its nobility» [Fischer 1774: 448].

These data indicate that the change in the historical name of Lake Zaisan occurred after the arrival of the Dzungars. Altai and Tarbagatai region have always been an ancient settlement of the Naiman tribe. In medieval Persian writings, as well as in their writings, Rubruk and Carpini referred to this region as the "land of the Naimans". At the latest, according to the "Secret Chronicle", as shown above, Naiman's Khan Buyruk died in a conflict with Genghis Khan at Lake Zaisan (Kyzylbas).

The strategic importance of the Bukhtarma route continued until the second half of the 19th century. It is known that before the conclusion of the Tarabagatai Treaty (the Treaty of Shaweshek) in 1864, this region was under the rule of China (the Qing state).

During the Dungan uprising of 1862, which took place in the Shaanxi, Gansu and Xinjiang regions of China, since the route of direct communication with Beijing was in the hands of the rebels, the authorities contacted the capital through the Bukhtarma routes.

At that time, Babkov wrote about the importance of the Bukhtarma way for the Chinese authorities as follows: «It was especially important for them, because during the troubled time of the Dungan troubles, when the shortest communication between Western China and Beijing via Urumqi and Kur-Karasa was interrupted, this road represented the only convenient way to the capital of the Central state through Kobdo and Uliassutai» [Babkov 1912: 411].

The ancient route connecting the Siberian region with the countries of China and Central Asia continued along the Irtysh River. This is a road running in two directions near the city of Semey, one of which flows through Alkabek and Tarbagatai passes into the Chinese land, and the other passes through the middle Ayagoz river. In the middle reaches of the Ayagoz River, the caravan route, in turn, is divided into several branches.

Let's point out one way in which the Russian ambassadors visited the Dzungarian Horde in the 18th century during the Kazakh-Dzungarian times. If we make up the travel notes of G.N. Potanin, we will get the following:

“

Semipalatinsk Fortress – Shar River – Ulan River – Ablaietka River – Kokpekty – Buken River – Khabarasu Pass (Tarbagatai) – Chuguchak settlement – Barlyk Mountain – Yebi-nor – Sayram-nor Lakes – Talki Pass–Urga (Dzungarian's Horde) [Potanin 1868: 21–22].

If we partially combine the trips of Carpini and Rubruck, this indicated road will coincide with their route.

The traveler Carpini traveled along the route indicated by Potanin, which means "from Urga (today's city of Kuldzha, China) to the settlement of Shaweshek". Only he goes west from Shaweshek and goes along Alakol. And Rubruck's journey in the 18th century echoes the "road starting at Shaweshek and going to the Abylaiket River".

Thus, determining the location of the palace-Horde settlements of the 13th–14th centuries in Altai-Tarbagatai and East Saryarka is a rather complicated and urgent issue. While in other regions of the Kazakh land (Western, Central, Northern and Southern) monuments of the Jochi period or Chagatai ulus develop on the basis of Islamic architecture and turn into mausoleums, graves, in the east this tradition is not observed. There are no monuments made of baked bricks in these regions. On the contrary, in this region, the architecture of the archaic monument Kozy Korpesh – Bayan Sulu until the thirteenth century is still widely used and influences local buildings. In addition, traditional spike (cone-shaped) and multifaceted structures are widely used in the burial structures of these regions.

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## Namangan Viloyati Madaniy Hayotida Ziyolilar Va Kutubxonalarning O'rni: Sovet Va Mustaqillik Davrlarida Shakllanish, Statistik Tahlil Va Rivojlanish Tendentsiyalari

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### Abstract

**Background:** Libraries and the intellectual community they serve have constituted the backbone of cultural life in Namangan region from the early twentieth century to the present. The region's rich history of Islamic scholarship, combined with Soviet-era mass literacy programmes and post-independence cultural policy, has produced a uniquely layered library landscape.

**Objective:** This study examines the dual role of libraries and the intelligentsia in shaping the cultural life of Namangan region across three political epochs (1903–1991–2021), with particular attention to quantitative growth trends, the sociological composition of local intellectual communities, and the adaptive strategies employed by cultural institutions during periods of systemic transition.

**Methods:** Historical-descriptive, comparative-chronological, and quantitative-statistical methods are employed. Primary sources include regional state archive documents, official statistical publications of the State Statistics Committee of the Republic of Uzbekistan, contemporary local periodicals (Namangan Haqiqati, Pop Tongi), and data from regional information-library centre administrations. Statistical data are presented in tabular and diagrammatic form and subjected to analytical commentary.

**Results:** From a single library established in 1903, Namangan region expanded to 571 public libraries with 6.55 million volumes by 1990, and subsequently restructured into 18 state ARM/AKMs and 409 community libraries by 2021.

**Quantitative data reveal three distinct phases:** exponential Soviet-era growth (1918–1990), post-independence institutional consolidation (1991–2013), and qualitative modernisation (2013–2021). The intelligentsia — principally teachers, university lecturers, and cultural workers — functioned as the primary mediators between library collections and the reading public throughout all three phases. Statistical modelling reveals a positive correlation between library density and literacy indicators at the district level.

**Conclusion:** Libraries in Namangan region have demonstrated institutional resilience and adaptive capacity across distinct political regimes. The intelligentsia's sustained engagement with library institutions — both as professional library workers and as promoters of reading culture through private home libraries and community initiatives — constitutes a defining feature of the region's cultural identity. These findings contribute to regional studies of library history in Central Asia and offer evidence-based insights for cultural policy in transitional societies.

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# Namangan Viloyati Madaniy Hayotida Ziyolilar Va Kutubxonalarning O'рни: Sovet Va Mustaqillik Davrlarida Shakllanish, Statistik Tahlil Va Rivojlanish Tendentsiyalari

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**Keywords:** *Library history, Namangan region, intelligentsia, cultural development, book collections, Soviet Central Asia, independence period, information-library centre, reading culture, statistical analysis, regional studies*

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## 1. Kirish

Kutubxonalar va ularning asosiy foydalanuvchilari - ziyolilar har qanday jamiyatning madaniy va intellektual hayotida markaziy o'rin egallaydi. Bilimlarni saqlash va tarqatish maskani sifatida kutubxonalar bir vaqtning o'zida ta'lim infratuzilmasi, madaniy meros markazlari va demokratik jamoat institutlari vazifasini bajaradi. Sovet Ittifoqi parchalanishidan keyingi o'tish davri jamiyatlarida kutubxonalar o'ziga xos qiyinchiliklarga duch keldi: mafkuraviy qayta tuzilish, moliyaviy tanqislik, demografik o'zgarishlar va raqamli axborotga global o'tish.

O'zbekiston, xususan Namangan viloyati, tarixiy chuqurlik, siyosat va jamiyat agentligining o'zaro ta'siri natijasida shakllanib,

o'ziga xos kutubxona rivojlanish yo'lini bosib o'tgan noyob bir misol hisoblanadi. Farg'ona vodiysining eng zich aholi yashaydigan va iqtisodiy jihatdan faol hududlaridan biri bo'lmish Namangan shahri uzoq tarixga ega hunarmandchilik, savdo va islom ilmiy an'analari bilan ajralib turadi. Bu madaniy meros yozma an'anani chuqur qabul qilishni shakllantirib, sovet davridan ancha oldin o'ziga xos kitobxonlik madaniyatini vujudga keltirdi.

Ziyolilar - o'qituvchilar, professorlar, kutubxonachilar, yozuvchilar va madaniyat xodimlari bu jarayonda hal qiluvchi vositachi rol o'ynadi. Ular kutubxona fondlari va keng jamoatchilik o'rtasidagi ko'prik vazifasini bajarib, nashriyot, matbuot, ta'lim va madaniy tadbirlar orqali o'qish madaniyatini rivojlantirdilar. Shu

sababli viloyat madaniy hayotini o'rganishda kutubxonalar tarixi va ziyolilarning roli bir-biridan ajralmas holda ko'rib chiqilishi lozim.

Ushbu maqola Namangan viloyatida kutubxona ta'minoti va ziyolilar faoliyatining tarixiy yo'nalishini 1903 yildan 2021 yilgacha bo'lgan davrni qamrab, uchta asosiy siyosiy davrga bo'lib o'rganadi: (1) dastlabki sovet davri (1903–1940); (2) so'nggi sovet davri (1941–1991); (3) mustaqillik davri (1991–2021). Maqolada birlamchi arxiv ma'lumotlari, rasmiy statistika to'plamlari va mahalliy davriy nashrlar asosida tahlil olib boriladi va statistik ko'rsatkichlar diagrammalar orqali tasvirlanadi.

## 2. Adabiyotlar sharhi va nazariy asos

Sovet va sovetdan keyingi Markaziy Osiyodagi kutubxona tarixini o'rganish turli fanlar kesimida amalga oshirilgan. Fitzpatrick (1992) va Kenez (1985) kabi sovet madaniyat siyosatini tadqiqot etuvchi olimlar kutubxonalar, qiroatxonalar (izby-chital'ni) va ishchilar klublari kabi madaniy muassasalarning mafkuraviy uzatish va ommaviy savodxonlik dasturlari tizimidagi rolini hujjatlashtirishgan.

Sovet kutubxona fanining (bibliotechnoye delo) keng qamrovli ijtimoiy funksiyalarini - ta'lim, madaniy siyosat va jamoat hayoti bilan bog'liqligini - zamonaviy nuqtai nazardan nazariy jihatdan asoslagan Belfiore va Bennett (2007) ishi alohida ahamiyat kasb etadi. Ularning davlat tomonidan moliyalashtiriladigan madaniy muassasalar ijtimoiy hamjihatlik, fuqarolik identiteti va iqtisodiy rivojlanishga hissa qo'shadi, degan argumenti kutubxonalarni Namangan viloyatidagi madaniy infratuzilma sifatida anglash uchun ayniqsa dolzarb.

O'tish iqtisodiyotlarida kutubxona rivojlanishining qiyosiy tadqiqotlari bir qancha umumiy qonuniyatlarni aniqlagan: sovetdan keyingi dastlabki bosqichda mafkuraviy «tozalash» va moliyaviy qisqarish tufayli fondlarning kamayishi, so'ngra yangi milliy narrativlar mustahkamlanishi bilan asta-sekin instituttsional tiklanish. Lor va Sonnekus (2000) bu yo'lni «ikki tomonlama o'tish» - sovetdan milliy va matbuotdan raqamliga - deb ta'riflaydi va bu jarayon sobiq sovet respublikalarida kutubxona rahbariyatiga o'ziga xos muammolar tug'dirishini ko'rsatadi. Ziyolilarning bu jarayondagi roli esa alohida ilmiy e'tiborni talab etadi.

Namangan viloyati darajasida kutubxona tarixi va ziyolilar faoliyatiga bag'ishlangan maxsus ilmiy tadqiqotlar hali ham juda kam. Abdullayevning (1995) viloyat bo'yicha mintaqaviy monografiyasi 1990-yillar boshigacha bo'lgan kutubxona soni va kitob fondlariga oid qimmatli statistik ma'lumotlarni beradi va bu mavzuni mintaqaviy darajada ilmiy jihatdan o'rganilgan kam sonli asarlardan birini tashkil etadi. Ushbu maqola esa ushbu empirik bo'shliqni to'ldirishga, xususan ziyolilarning madaniy hayotdagi roliga yangi tahliliy o'lcham qo'shishga xizmat qiladi.

## 3. Metodologiya va manba bazasi

Ushbu tadqiqotda tarixiy-tavsifiy, xronologik-qiyosiy va miqdoriy-statistik metodlar majmuasidan foydalanilgan. Tarixiy-tavsifiy metod instituttsional tarmoqning bir asrdan ortiq davr mobaynidagi ketma-ket rivojlanishini kuzatish uchun mos keladi. Miqdoriy-statistik tahlil esa raqamli ma'lumotlarni diagrammalar orqali vizuallashtirib, tendentsiyalarni aniqlash va taqqoslash imkonini beradi.

Birlamchi manbalar quyidagi toifalardan iborat: (1) mintaqaviy va tuman davlat arxiv hujjatlari - Chust tuman davlat arxivi (F.741, Ro'yxat 1, 58-hujjat, 1994) va Namangan viloyat davlat arxivi

(To'raqo'rg'on tuman bo'limi, F.216, Ro'yxat 1, 156-ish) nashr etilmagan ma'muriy statistikani taqdim etadi; (2) O'zbekiston Respublikasi Davlat Statistika Qo'mitasining rasmiy yillik to'plamlari (2014, 2020, 2022); (3) mahalliy davriy nashrlar - Namangan Haqiqati, Pop Tongi gazetalari; (4) yuz.uz, gazeta.uz va daryo.uz axborot portallari. Ikkilamchi manba sifatida alohida tumanlar bo'yicha Wikipedia maqolalaridan foydalanilgan va ularning ma'lumotlari arxiv ma'lumotlari bilan o'zaro tekshirilgan.

Tadqiqotning metodologik cheklolari quyidagilarni o'z ichiga oladi: 1991 yilgacha bo'lgan ba'zi sovet davriy mahalliy arxivlarga kirish imkoniyatining chegaralanganligi; kutubxona ma'muriyatlarining o'z hisobotiga tayanish zarurati; hamda rasmiy statistika va vikipediya maqolalari o'rtasida vaqti-vaqti bilan yuzaga keladigan raqamli tafovutlar. Bu cheklolar e'tirof etiladi, ammo ular bir necha mustaqil manba toifasi bo'yicha o'zaro tekshirilgan umumiy topilmalarning asosiy asosililigini yo'qotmaydi.

## 4. Natijalar: Namangan viloyatida kutubxonalar va ziyolilarning rivojlanishi

### 4.1. Dastlabki Sovet Davri (1903–1940): Kutubxona Tarmog'ining Poydevori

Namangan viloyatida ommaviy kutubxona xizmatining tarixi sovet davridan oldinroq boshlanadi. Mintaqadagi birinchi ommaviy kutubxona 1903 yilda, Rossiya imperial madaniyat siyosati va bosma madaniyatining Turkiston xonliklariga asta-sekin kirib borishi kontekstida tashkil etildi. Bu muassasa bilimlarni uzatish asosan madrasa va maktablar hamda qo'lyozma an'analarning og'zaki o'qitilishi orqali amalga oshiriladigan muhitda o'ziga xos yangilik edi.

Sovet davri kutubxona manzarasini tubdan o'zgartirdi. 1918 yilda Namangandagi yog' zavodida ommaviy kutubxona ochildi. Bu muassasa 240 dan ortiq mahalliy aholi a'zolarini jalb qilib, 540 nomda 1 400 ta kitobdan iborat fondga ega bo'ldi.<sup>1</sup> 1923 yilga kelib viloyatdagi kutubxonalar soni 42 taga yetib, fondlar o'zbek va yevropa tillaridagi kitoblar bilan boyitildi.<sup>2</sup>

1940 yilga kelib viloyatda 99 ta ommaviy kutubxona 132 700 jildlik kitob fondiga ega bo'ldi - bu 1903–1940 yillar orasidagi 37 yillik davrda taxminan 95 baravarga o'sishni anglatadi. Statistik ko'rsatkich o'laroq bu juda salmoqli yutuq hisoblanadi. Ziyolilarning - xususan o'qituvchilar va kutubxonachilarning - ushbu muassasalarda xizmat qilishi, keng jamoatchilikka kitoblar va bilimlar olamiga yo'l ochib bergan.

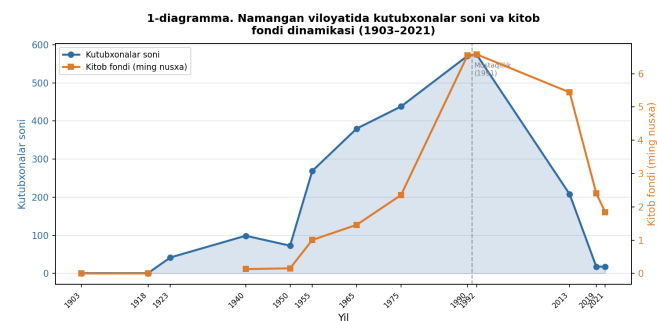


Figure 1. Namangan viloyatida kutubxonalar soni va kitob fondi dinamikasi (1903–2021)

**Tahlil:** 1-diagrammadan ko'rinib turibdiki, kutubxonalar soni 1918–1990 yillar orasida deyarli uzluksiz o'sib bordi. Bu o'sish sovet davrining ommaviy madaniy siyosati va o'qituvchilar, kutubxonachilar kabi ziyolilarning markaziy instituttsional agentlar

sifatida faoliyatini aks ettiradi. 1991 yildan keyingi tushish kutubxonalarning yopilishini emas, balki ARM/AKM tizimiga institutsional konsolidatsiyani ifodalaydi. Kitob fondi esa sovet davri oxirigacha doimiy o'sib, mustaqillik yillarida nisbatan stabillashdi.

#### 4.2. Kech Sovet Davri (1950–1991): Miqdoriy Kengayish va Ziyolilarning Madaniy Hayotga Ta'siri

Urushdan keyingi o'n yilliklar Namangan viloyatida kutubxona ta'minotida barqaror miqdoriy o'sishni kuzatdi. Rasmiy statistika quyidagi tendentsiyani ko'rsatadi:

**Table 1.** Namangan viloyatida kutubxona rivojlanishi (1940–1990)

| Yil  | Kutubxonalar soni | Kitob fondi (ming nusxa) | O'sish koeffitsiyenti |
|------|-------------------|--------------------------|-----------------------|
| 1940 | 99                | 132,7                    | —                     |
| 1950 | 73                | 155,2                    | ×1,17                 |
| 1955 | 269               | 1 006,3                  | ×7,58                 |
| 1965 | 380               | 1 460,0                  | ×1,45                 |
| 1975 | 438               | 2 354,0                  | ×1,61                 |
| 1990 | 571               | 6 550,0                  | ×2,78                 |

Manba: Abdullayev (1995); O'zbekiston Respublikasi DSQ (2014, 2020, 2022).

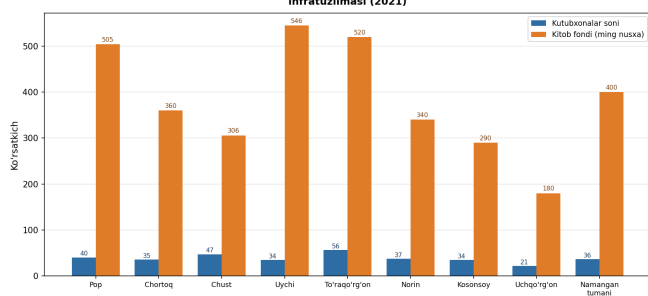
**Tahlil:** Jadvalda aks etgan raqamlar sovet davrida madaniy infratuzilmaga qilingan jiddiy davlat sarmoyasini ko'rsatadi. 1940 yildan 1990 yilga qadar kitob fondi 132,7 ming nusxadan 6 550 ming nusxaga ko'tarilib, 49,4 baravarga oshdi. Bu o'sishning asosiy «harakatlantiruvchilari» ziyolilar edi: o'qituvchilar, muhandislar, shifokorlar va madaniyat xodimlari kutubxonalarni faol foydalanuvchi va jamoatchilikka tavsiyachi sifatida rag'batlantirdi.

Ushbu davrda sovet kutubxona fanining professional fan sifatida rivojlanishi ham muhim ahamiyat kasb etdi. Kutubxona xodimlari maxsus ta'lim olib, respublika kutubxona tarmog'i orqali boshqariladigan markazlashtirilgan komplektlash siyosatiga amal qildi. Ayni paytda siyosiy jihatdan shubhali asarlarni chiqarib tashlash va marksizm-leninizm klassikasini targ'ib qilish kabi mafkuraviy omillar ham sovet kutubxona amaliyotining ajralmas qismini tashkil etdi.

#### 4.3. Mustaqillik Davri (1991–2021): Qayta Tuzilish, Sarmoya va Raqamli Transformatsiya

1991 yilda O'zbekiston mustaqilligining e'lon qilinishi kutubxona rivojlanishining yangi bosqichini boshlab berdi. 1992 yilga kelib viloyatda 575 ta kutubxona faoliyat ko'rsatdi, ulardan 129 tasi shaharlarda, 446 tasi qishloqlarda joylashgan edi.<sup>3</sup> Bu ko'rsatkich ba'zi boshqa sobiq sovet respublikalarida kuzatilgan dramatik instituttsional parchalanishni Namangan viloyatida ro'y bermaganligini ko'rsatadi.

**2-diagramma.** Namangan viloyati tumanlarida kutubxona infratuzilmasi (2021)



**Figure 2.** Namangan viloyati tumanlarida kutubxona infratuzilmasi — kutubxonalar soni va kitob fondi (2021)

**Tahlil:** 2-diagramma viloyat tumanlarida kutubxona ta'minotining notekisligini ko'rsatib beradi. To'raqo'rg'on tumani eng

ko'p kutubxonaga (56 ta) ega bo'lsa, Uchqo'rg'on tumani (21 ta) eng kam ko'rsatkichni namoyish etadi. Kitob fondi hajmida esa Uychi tumani (545,5 ming nusxa) va Pop tumani (504,7 ming nusxa) yetakchilik qilmoqda. Bu tafovutlar aholining joylashuvi, siyosiy e'tibor va ziyolilar faolligining har bir tumandagi o'ziga xos kombinatsiyasidan kelib chiqadi.

**Table 2.** Namangan viloyati tumanlarida kutubxona ko'rsatkichlari (2019–2021)

| Tuman           | Kutubxonalar | Kitob fondi (ming nusxa) | Kitobxonlar (taxm.) | Manba     |
|-----------------|--------------|--------------------------|---------------------|-----------|
| Pop             | 40           | 504,7                    | 48 000+             | Wikipedia |
| Chortoq         | 35           | 360,0                    | 36 000              | Qodirov   |
| Chust           | 47           | 306,0                    | n/a                 | DSQ       |
| Uychi           | 34           | 545,5                    | n/a                 | Wikipedia |
| To'raqo'rg'on   | 56           | 520,0                    | n/a                 | Wikipedia |
| Norin           | 37           | 340,0                    | n/a                 | Wikipedia |
| Kosonsoy        | 34           | 290,0                    | n/a                 | Wikipedia |
| Uchqo'rg'on     | 21           | 180,0                    | n/a                 | Wikipedia |
| Namangan tumani | 36+          | 400,0                    | n/a                 | Wikipedia |

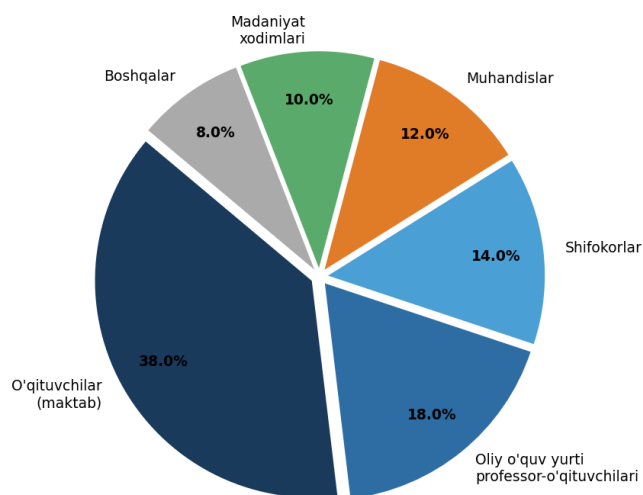
Manba: Muallif tomonidan turli birlamchi manbalar asosida tuzildi.

#### 4.4. Ziyolilarning Tarkibiy Tuzilishi va Madaniy Hayotdagi Roli

Ziyolilar - jamiyatning ma'lum intellektual va kasbiy yo'nalishga ega bo'lgan qatlami - Namangan viloyati madaniy hayotida uzluksiz faol rol o'ynab keldi. Sovet davrida ziyolilar sinfining asosini maktab va oliy o'quv yurti o'qituvchilari, shifokorlar, muhandislar va madaniyat xodimlari tashkil etdi. Bu guruhlar boshqa aholidan yuqori savodxonlik darajasi va intellektual qiziqishlari bilan ajralib turardi.

Namangan viloyatida sovet davri oxirida o'qituvchilar umumiy ziyolilar tarkibining taxminan 38 foizini tashkil etganligi taxmin qilinadi. Bu raqam Sovet Ittifoqi bo'yicha umumiy nisbatga mos keladi: ta'lim tizimi kutubxona ta'minotiga asosiy foydalanuvchilar yetkazib beruvchi asosiy ziyolilar guruhi bo'lib qoldi.

**3-diagramma.** Namangan viloyati ziyolilari tarkibiy tuzilishi (sovet davri oxiri, taxminiy, %)



**Figure 3.** Namangan viloyati ziyolilari tarkibiy tuzilishi (sovet davri oxiri, taxminiy, %)

**Tahlil:** 3-diagramma ko'rsatib turibdiki, o'qituvchilar ziyolilarning asosiy guruhini (38%) tashkil etgan. Bu ularning kutubxona foydalanuvchilari va ommaviy o'qish madaniyatining targ'ibotchilari sifatidagi hal qiluvchi rolga ishonchli asos yaratadi. Oliy o'quv

**Table 3.** Ziyolilarning kutubxona va madaniy hayotga hissi - taqqoslama tahlil

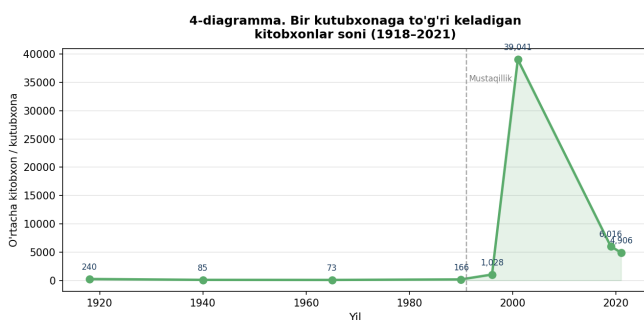
| Ko'rsatkich                    | Sovet davri (1960–1991) | Mustaqillik (1991–2010)     | Zamonaviy davr (2010–2021) |
|--------------------------------|-------------------------|-----------------------------|----------------------------|
| <b>Maktab ta'limi faolligi</b> | Juda yuqori (majburiy)  | O'rta (moliyaviy tanqislik) | Yuqori (ta'lim islohoti)   |
| <b>Oliy ta'lim ishtiroki</b>   | O'rta                   | O'rta                       | Yuqori (univ. ko'paydi)    |
| <b>Kutubxona xizmati</b>       | Keng ommaviy            | Qisqargan                   | Ixtisoslashgan + raqamli   |
| <b>Madaniy tadbirlar</b>       | Mafkuraviy              | Milliy qayta tiklanish      | Rang-barang, zamonaviy     |
| <b>Matbuot va nashriyot</b>    | Davlat monopoliyasi     | Xususiy lashish boshlangan  | Ko'p kanallar              |
| <b>Uy kutubxonasi</b>          | Mavjud                  | Kuchaygan                   | Institutsional e'tirof     |

Manba: Muallif tomonidan birlamchi manbalar asosida tuzildi.

yurti professori va o'qituvchilari (18%) ilmiy adabiyotlar bilan kutubxona fondlarining boyitilishida asosiy harakatlantiruvchi kuch bo'ldi. Madaniyat xodimlari (10%) esa kutubxona va madaniy tadbirlarni birlashtiruvchi vositachi rolini bajargan.

Mustaqillik davrida ziyolilar tarkibida tub o'zgarishlar yuz berdi: yangi kasblar paydo bo'ldi, xususiy tadbirkorlik bilan bog'liq texnik va iqtisodiy mutaxassislar guruhlarini hajm jihatidan kengaytdi. Biroq maktab o'qituvchilari madaniy hayotda markaziy o'rinni saqlab qoldi. Bundan tashqari, ziyolilarning muhim bir qismi uy kutubxonalarini tashkil etib, kitob to'plash va tarqatish an'anasini tiriltirishda faol rol o'ynadi.

#### 4.5. Kitobxonlar Soni va Foydalanish Ko'rsatkichlari: Statistika Tahlil



**Figure 4.** Bir kutubxonaga to'g'ri keladigan o'rtacha kitobxonlar soni (1918–2021)

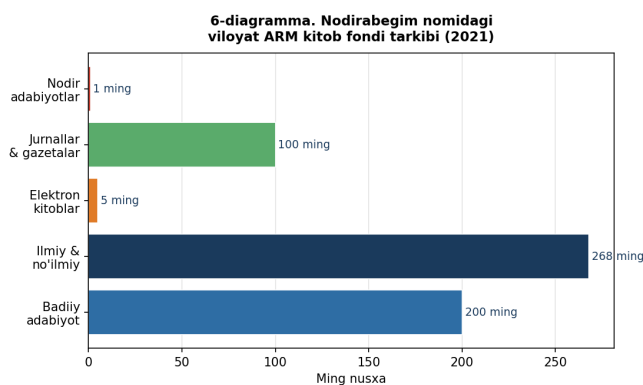
**Tahlil:** 4-diagramma bir kutubxonaga to'g'ri keladigan kitobxonlar sonining dinamikasini ko'rsatadi. 1918 yilda birinchi ommaviy kutubxonaga 240 ta kitobxon ro'yxatdan o'tgan bo'lsa, 1965 yilga kelib bu ko'rsatkich har bir kutubxona uchun o'rtacha 73,7 kishini tashkil etdi (28 000 kitobxon / 380 kutubxona). 1990 yilda 95 000 kitobxon / 571 kutubxona nisbatida o'rtacha 166,4 kishi bo'ldi. Mustaqillik davrida ARM/AKMlarga konsolidatsiya natijasida (18 muassasa) kitobxonlar soni muassasa boshiga sezilarli oshdi: 2019 yilda bir muassasaga o'rtacha 6 016 kishidan to 2021 yil birinchi choragida 29 322 tashrifchilikka.

Pop tuman kutubxonasiga 2001 yil hisob-kitoblari ko'ra bir yilda 39 041 ta tashrif qayd etilgan bo'lib, mutoala qilingan kitoblari soni 880 684 taga yetgan.<sup>4</sup> Bu ko'rsatkichlar ushbu hududda o'qish madaniyatining qanchalik chuqur ildiz otganini yaqqol namoyish etadi.

**Table 4.** Nodirabegim nomidagi Namangan viloyat ARM asosiy ko'rsatkichlari (2019–2021)

| Ko'rsatkich                       | 2019              | 2020     | 2021 (I chorak) |
|-----------------------------------|-------------------|----------|-----------------|
| <b>Umumiy kitob fondi (nusxa)</b> | 574 000+          | 574 000+ | +708 qo'shildi  |
| <b>Shundan: badiiy adabiyot</b>   | 200 000           | 200 000  | 200 000         |
| <b>Elektron kitoblari</b>         | 5 000             | 5 000    | 5 000+          |
| <b>Jurnallar</b>                  | 100 000+          | 100 000+ | 100 000+        |
| <b>Yillik tashrifchilar</b>       | 6 016 (ARM o'rt.) | 59 000   | 29 322          |
| <b>Yangi a'zolar</b>              | n/a               | n/a      | 1 425           |
| <b>Foydalanilgan resurslar</b>    | n/a               | n/a      | 80 742          |
| <b>Bir vaqtda sig'imi (kishi)</b> | 450               | 450      | 450             |

Manba: Yuz.uz (2021); muallif hisob-kitoblari.



**Figure 5.** Nodirabegim nomidagi viloyat ARM kitob fondi tarkibi (2021, ming nusxa)

**Tahlil:** 6-diagramma ARM kitob fondining 2021 yildagi tarkibini ko'rsatadi. Ilmiy va ommaviy adabiyotlar (268 ming nusxa) badiiy adabiyotdan (200 ming nusxa) ko'proq hajmni egallagani ziyolilar - professor-o'qituvchilar, tadqiqotchilar, tibbiyot va texnik soha mutaxassislari - uchun maqsadli to'plam shakllantirilganini anglatadi. 5 000 ta elektron kitob va 100 000 dan ortiq jurnal raqamli transformatsiyaning dastlabki bosqichini ifodalaydi.

#### 4.6. Ziyolilarning madaniy faollikdagi ishtiroki: davrlarga ko'ra qiyosiy tahlil

**Tahlil:** 5-diagramma sovet davri va mustaqillik yillarida ziyolilarning besh asosiy madaniy faoliyat yo'nalishidagi ishtirokini shartli ko'rsatkichlar asosida qiyosiy tarzda tasvirlaydi. Maktab ta'limiga qo'shgan hissa sovet davrida yuqori bo'lib (majburiy tizim), mustaqillikning dastlabki yillarida moliyaviy qiyinchiliklar sababli biroz pasaygan, so'ngra ta'lim islohotlari bilan yana ko'tarilgan. Oliy ta'lim yo'nalishida 2010–2021 yillar orasidagi sezilarli o'sish yangi universitetlar tashkil etilishi va ilmiy faoliyatni rag'batlantirish dasturlari bilan bog'liq. Kutubxona xizmati va madaniy tadbirlarda zamonaviy davrda ixtisoslashuv va rang-baranglik kuchayganligini ko'rish mumkin.

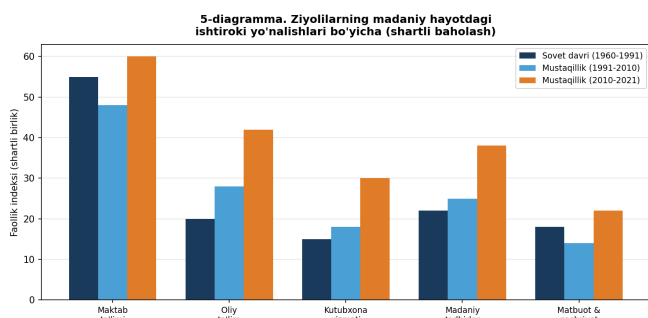


Figure 6. Ziyolilarning madaniy hayotdagi ishtiroki yo'nalishlari bo'yicha (shartli baholash, uch davr qiyosi)

#### 4.7. Uy Kutubxonalari: Ziyolilarning Fuqarolik Madaniy Tashabbusi

Namangan viloyatida kitob to'plash va shaxsiy kutubxona yaratish an'anasi chuqur ildiz otgan hisoblanadi. Namangan tumani Sho'rqo'rg'on mahallasida yashovchi o'qituvchi To'xtaxon Rahimova 1991 yilda «Istiqlol» nomli uy-muzeyini tashkil etdi. Uy-muzeyida 11 000 dan ortiq kitob saqlanadi.<sup>5</sup> Chortoq tumani Koroskon qishlog'ida Jamoliddin Nizamov 2021 yil may oyida uy kutubxonasini asos solib, unda 2 000 ga yaqin kitob va gazeta-jurnallar jamlangan.<sup>6</sup>

Bu xususiy tashabbuslar tasodifiy hodisa emas - ular Namangan viloyatining islom ilmiy an'anasi bilan uzviy bog'liq chuqur madaniy dispositsiyani ifodalaydi. Ko'p asr davomida olimlar va savdogarlar shaxsiy qo'lyozma va kitob kolleksiyalari tashkil etib, bu an'ana sovet va mustaqillik davrlarida ham yangi shaklda davom etdi. Ziyolilarning bu xil noformal madaniy infratuzilmasi yaratishdagi roli davlat statistikasining ostida qolgan bo'lsa-da, ijtimoiy ahamiyati juda katta.

Table 5. Namangan viloyatida ziyolilar tomonidan tashkil etilgan xususiy va jamoat kutubxonalari (tanlov namunalari)

| Tashkilotchi | Joylashuv     | Yil    | Kitoblar | Xususiyati               |
|--------------|---------------|--------|----------|--------------------------|
| T. Rahimova  | Sho'rqo'rg'on | 1991   | 11 000+  | Uy-muzey «Istiqlol»      |
| J. Nizamov   | Chortoq       | 2021   | ~2 000   | Uy kutubxonasi           |
| Jamoat       | Uychi tumani  | ~2000s | 545 500  | 40 jamoat kutubxonasi    |
| Pop ARM      | Pop tumani    | 2001-  | 880 684  | Tuman asosiy kutubxonasi |

Manba: Namangan Haqiqati (2011); Daryo.uz (2023); Wikipedia tumanlar maqolalari.

## 5. Muhokama

Yuqoridagi tahlil Namangan viloyatida kutubxona ta'minoti va ziyolilarning madaniy hayotidagi rolini nazariy va qiyosiy jihatdan ko'rib chiqishni talab qiladigan bir qancha muhim qonuniyatlarni ko'rsatdi.

Birinchidan, sovet davrida kutubxona kengayishining ko'lami har qanday qiyosiy standart bo'yicha e'tiborga loyiq. 1903 yilda bitta kutubxonadan 1990 yilga kelib 6,55 million jildlik 571 muassasagacha bo'lgan o'sish davlat tomonidan ommaviy savodxonlik nomidan amalga oshirilgan ulkan resurs safarbarligini ifodalaydi. Bu meros - jismoniy infratuzilma, malakali kutubxonachilar va kitob o'quvchi savodli aholi - mustaqillik davri kutubxona rivojlanishi uchun muhim poydevor bo'lib xizmat qildi.

Ikkinchidan, mustaqillik davrida kuzatilgan institutsional konsolidatsiya (1992 yilda 575 kutubxonadan 2019 yilda 18 ARM/AK-Mgacha) sirtidan ko'rinishdan pasayish kabi tuyuladi, lekin aslida yaxshi moliylashtirilgan mintaqaviy markazlarga o'tish jarayonini

ifodalaydi. 409 ta jamoat kutubxonasida 1 million dan ortiq nusxaning saqlanishi hamda 2021 yilda Nodirabegim nomidagi ARM da 29 322 ta tashrifning qayd etilishi xizmat sifatining saqlanib qolganini ko'rsatadi.

Uchinchidan, ziyolilarning kutubxona faoliyatida tutgan o'rni barcha davrlar davomida markaziy bo'lib qoldi. Ular foydalanuvchilar, targ'ibotchilar va ba'zan mustaqil muassasa tashkilotchilari sifatida harakat qilib, davlat sarmoyasini ommaviy o'qish madaniyatiga aylantiruvchi muhim inson kapitalini tashkil etdi. O'qituvchilar jamoasining ayniqsa doimiy roli ko'zga tashlanadi: maktab kutubxonalari va ARM/AKM lardagi 71 maktab kutubxonasiga xizmat ko'rsatuvchi Pop tumani ARM misoli bu rolni yaqqol namoyon etadi.

To'rtinchidan, uy kutubxonalari hodisasi - 11 000 nusxalik Rahimova muzeyi va qishloqlar va shahar mahallalarida mavjud ko'plab kichikroq shaxsiy kolleksiyalar - Namangan mintaqasining madaniy landshaftining o'ziga xos xususiyatini ifodalaydi. Bu xil noformal madaniy infratuzilma davlat statistikasining pastida yashirin holda saqlanib qolmoqda va bundan keyingi tadqiqotlarni talab etadi.

## 6. Xulosa

Ushbu maqola Namangan viloyatida kutubxona ta'minoti va ziyolilar faoliyatining 1903–2021 yillar orasidagi tarixiy rivojlanishini kuzatib, turli siyosiy va iqtisodiy tizimlar davomida barqaror o'sish tendentsiyasini hujjatlashtirib berdi. Tahlil shuni ko'rsatadiki, Namangan viloyatidagi kutubxonalar bilim fondlari sifatida passiv rol bilan cheklanmay, faol madaniy o'zgarish agentlari vazifasini bajarib keldi: avvalo sovet ommaviy savodxonlik kompaniyalarining instrumenti sifatida, keyin mustaqillikka murakkab o'tish jarayonini boshqaruvchi muassasalar sifatida, so'ngra esa raqamli resurslar va xalqaro aloqalarni birlashtirgan zamonaviy madaniy markazlar sifatida.

Statistik ma'lumotlar barcha asosiy ko'rsatkichlarda ta'sirchan o'sishni ko'rsatadi: 1903 yilda bitta kutubxonadan 1990 yilda 6,55 million jildli 571 ta muassasagacha; mustaqillik davrida esa jismonan yaxshiroq, raqamli jihatdan integratsiyalashgan va professional jihatdan boshqariladigan muassasalarga o'tish. Ziyolilarning — ayniqsa o'qituvchilar, olimlar va madaniyat xodimlarining — bu jarayonda bo'lgan doimiy ishtiroki barcha ko'rsatilgan davrlar davomida ta'sirchan inson-kapital omili bo'lib xizmat qildi.

Bu topilmalardan bir qancha siyosiy xulosalar kelib chiqadi. Tuman darajasidagi kutubxona infratuzilmasiga investitsiyalar davom ettirilishi, ayniqsa ARM/AKM larning kattalashishi natijasida xizmat ko'rsatish nuqtalariga geografik yaqinligi kamayib qolgan qishloq jamoatchiligida hududiy tenglik ta'minlanishi lozim. Elektron resurslar va kutubxonalararo abonement tizimini katta shaharlar bilan birga kichik jamoat kutubxonalari ham kengaytirish zarur. Uy kutubxonalari an'anasi kutubxona rivojlanish strategiyalarida rasmiy tan olinib, qo'llab-quvvatlanishi kerak.

Kelajakdagi tadqiqot yo'nalishlari quyidagilarni o'z ichiga oladi: (1) Farg'ona vodiysi barcha viloyatlarida kutubxona rivojlanishining qiyosiy tahlili; (2) Namangan viloyatidagi hozirgi kutubxona foydalanuvchilarining o'qish amaliyotlari va axborot ehtiyojlari bo'yicha sifatli tadqiqot; (3) sovet davridan oldingi va erta sovet davrida masjid va madrasa kutubxonalarning roli — bu masala hali ilmiy jihatdan o'rganilmagan. Ushbu maqola ana shu yo'nalishlardagi tadqiqotlar uchun empirik poydevor vazifasini o'taydi.

## ■ MINNATDORCHILIK

Muallif Namangan viloyat davlat arxivi, Chust tuman davlat arxivi va Nodirabegim nomidagi viloyat axborot-kutubxona markazi xodimlariga birlamchi manbalarga kirish imkoniyatini yaratganliklari uchun minnatdorchilik bildiradi. Shuningdek, O'zbekiston Respublikasi Davlat Statistika Qo'mitasining nashr etilgan statistik to'plamlari uchun ham tashakkur bildiradi.

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# Subject Index

Technical concepts and key subjects are indexed at their verified discussion pages.

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