



SOURCE STUDIES AND HISTORIOGRAPHICAL STUDIES ИСТОЧНИКОВЕДЕНИЕ И ИСТОРИОГРАФИЯ

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Memoirs as a sort of biographical historical sources or as historical sources of personal origin: problems of terminology

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Abstract. The study examines the history of solving the problem of classification historical sources and the history of the emergence of three classification terms: category (type), sort (species) and “source of personal origin” when selecting biographical sources from the general body of historical sources. The author’s attention is focused on the current issue of terminological unity, or rather, logical purity (rigor) in the classification of biographical sources in scientific research. The study discusses scientific situation in which it is possible to apply the classification taxon “sources of personal origin” or the species classification of historical sources on their pragmatic function. The study concludes that it is advantageous to classify of historical sources by kind based on their pragmatic function.

Keywords: criteria of classification, taxon of classification, type of historical sources, kind of historical sources, pragmatic function of the historical source

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Мемуары — вид биографических исторических источников или источники личного происхождения: проблемы терминологии

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Аннотация. Рассмотрена история решения проблемы классификации исторических источников и появления трех классификационных терминов: категория (тип), вид и «источники личного происхождения» — при выделении биографических источников из общего корпуса исторических источников. Внимание автора сосредоточено на актуальной проблеме терминологического единства, точнее логической чистоты (строгости) терминологии при классификации биографических источников в научных исследованиях. Показаны научные ситуации, в которых возможно применение классификационного таксона «источники личного происхождения» или видовая классификация исторических источников на основе их прагматической функции. Сделан вывод о преимуществе использования классификации исторических источников по видам на основе их прагматической функции.

Ключевые слова: критерий классификации, таксон классификации, тип исторических источников, вид исторических источников, классификация исторических источников по видам, прагматическая функция исторического источника

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Introduction

In the second half of the 20th century Russian source studies grew primarily interested in the question of how historical sources should be classified, a problem widely discussed in academia and at research conferences. Special textbooks were written to guide novice historians and source scholars in their research. In academic literature, *three concepts* were consistently being introduced as principal classification taxon — origin, type and kind.

Debates on whether these three concepts should be used continue to this day, giving rise to disagreements, thus conditioning the need to develop a unified classification standard for scientific research (particularly in PhD theses).

This study aims to determine in what type of research (reviews) it might be useful to classify biographical sources based on their kind in their differentiation

within a wider corpus of historical sources on the basis of their purpose, as well as the principle of “personal origin”.

Initial attempts to categorize sources based on their origin

Classification of historical sources became a topic of especially heated debate in the 1960s and 1970s. In 1962, historians S.M. Kashtanov and A.A. Kurnosov suggested their definition of “origin”, understanding it as “the sum of features that determine the place of sources in public life: their intended purpose, authorship, context of creation” [1. P. 179].

They proposed to differentiate sources by their origin in three different spheres: socio-economic relations; socio-political struggle, social thought and culture; personal and family relations. However, the idea raised a number of objections and was rejected by the majority of Russian source scholars [2. P. 38]. In 1969, S.M. Kashtanov came up with a new formulation, indicating that “origin is understood as the sum of features characterizing specific conditions and reasons why a source was created (origin, authorship, purpose)” [3. P. 155]. Let us note that both formulations casually mentioned the word goal or purpose as a possible taxon of the classification. However, it did not become the main or fundamental principle.

If a scheme based on a classification taxon “origin” had been adopted, when conducting source studies, as applied to PhD research, it would have been necessary to systematize the sources involved along the lines of four principal *spheres* of human activities, where the documents reflecting one’s life and public participation pertain to. The first involves the sources of official origin that belong to the sphere of public administration (laws, treaties, international acts). The second comprises the sources that emerge in the sphere of economy, property and production relations (industry, finance, construction). The third pertains to the social sphere and includes the documents reflecting practical activities of political parties and public organizations (programs and charters, minutes and transcripts of meetings); episodic and periodical publications in the media); journalism in various forms: (manifestos, appeals, essays). The fourth sphere pertains to family life and personal endeavors. It might be reflected in various sources, usually of a biographical genre: memoirs, diaries, personal correspondence, notarial acts certifying the disposal of property (will, gift, marriage contract), etc.

Area-based classification of origin was soon rejected by Russian source scholars, since it did not allow for a formal-logical distinction between the sources. At the same time, some traces of this approach persisted for a long time especially in works devoted to biographies of various historical figures.

Emergence of the term “Sources of personal origin”

S.S. Dmitriev, who authored the chapter “Memories, Diaries, Private Correspondence” in two editions of a textbook on source studies, while classifying the above-mentioned materials as “various types of sources”, proposed two formulations of the term for classification by “origin”: “sources of private origin” [4. P. 347] and sources of personal origin that arise “in a private manner” [5. P. 342]. It should be noted that S.S. Dmitriev’s terms were solely based on how closely the source reflected its author’s personality, while the purpose of its creation (for its possible classification by kind) was taken into account only if the memoirist intended to publish the work “for wider reading — for contemporaries, generations to come, historians” [5. P. 343].

S.S. Dmitriev’s term was then overshadowed by the introduction of a new principle of classification of historical sources into Russian source studies; but it was not completely forgotten and received further development and a new interpretation in the late 20th century.

Information theory in solving the problem of historical sources classification

In the 1975–1980s, theoretical research by L.N. Pushkarev [6] and I.D. Kovalchenko [7. P. 129–148; 8. P. 106–125] brought about a methodological breakthrough in classification of historical sources. It was made possible by the introduction of information theory into Russian Source Studies, when historians embraced the concept of “information” as an inherent, primordial characteristic intrinsic to any source material they work with [6. P. 191].

The new approach was based on I.D. Kovalchenko’s idea of the syntactic aspect (feature) of information in historical sources as a criterion for their distribution into categories (types) [8. P. 122].

It introduced a two-tier division of historical sources. The first — typological — was based on the division (distribution) of sources by the method and form of embodiment, reflection, preservation and transmission of social information about a past event [9. P. 219]. At this level, the entire corpus of historical sources was divided into four categories (types) by the form of transmission: material, phonic, pictorial and written (listed in random order).

The second level of division — by kind — concerned written sources, in turn, distributed into separate groups — kinds — allocated on the basis of their social function that determined intentionally selected and designed framework of presenting information in the source. From this perspective, a primary *criterion* that distinguishes one type of source from another is its “*practical purpose*, the objective for which the given source was created, as well as the function that it performed throughout its existence in the

past” [9. P. 222]. Each type of historical source is characterized by consistent inherent properties that its author intentionally bases the source upon in line with its purpose in a given historical (socio-political, socio-cultural, or individual-psychological) environment.

Kinds of historical sources

Source: studies literature identifies five kinds of written sources based on the function they performed during their existence (creation and introduction into social practice) in the past:

- *normative and legislative (legal) documents* designed to organize public service, strengthen the relations between the state and society or other states, regulate people’s behavior in different social spheres (national, cultural, religious and domestic) [9. P. 224];
- *office paperwork* (including those pertaining to statistics) written with a view to implementing a socially beneficial (economic, educational, etc.) activity or building a party or another public organization (business correspondence, instructions, proceedings, verbatim reports, charters, etc.);
- *essays for opinion* (non-fiction), including both manuscripts and printed materials, created to influence public opinion (its formation and formulation), single or periodic, in various forms — loose-leaf books, brochures, newspapers, magazines, books and almanacs;
- *biographical sources* (memoirs, recollections, notes, diaries), whose principal function is to preserve and transmit to generations to come the information about a past event, to which the author was a witness or participant, as well as to establish (reinforce) “secondary” connections between a person (author) and society (contemporaries and descendants);
- *epistolary sources* (personal or private correspondence) that provided communication between contemporaries.

It would seem that in the 1980s the problem was resolved in favor of classification by kind based on a target functionality of a biographical source. However, at the turn of the 20th–21st centuries, a new methodological approach to understanding the nature of biographical sources emerged on the basis of anthropologically oriented paradigm and a general humanitarian method of historical knowledge aimed not only at clarifying co-existential connections of the author with his contemporaries and his era, but also with the evolutionary course of history, with generations to come.

Classification by origin returns

Thus, in 1998, a textbook written by a group of scientists from the Russian State Humanitarian University, justified the use of the term “sources of personal origin” (the titles of Chapter 11 in Section 2 and Chapter 11 in Section 3) as a corollary to the establishment of a novel realm of historical source genesis. This evolution was contingent upon the burgeoning intricacies of interpersonal dynamics in the contemporary era.

M.F. Rumyantseva, who authored these chapters, combined two forms of classification (by origin and by kind) while defining distinctions of a biographical source. She believed that “sources of personal origin are a group comprising different *kinds* of various historical sources created to establish interpersonal communication in an evolutionary and co-existential whole and auto-communication” [10. P. 466; 11. P. 202]. She maintained that sources of personal origin include varieties of biographical sources — from diaries and memoirs of various forms (memoirs-autobiographies, memoirs-portraits and memoirs — “modern stories”, i.e. tales of contemporaries and the epoch) to epistolary sources (private correspondence). However, uniting memoirs and personal letters in a single group contradicts the principle of classification by kind, since the functions of epistolary sources differ from those of memoirs — epistolary forms a separate type of historical sources.

At the turn of the 21st century, M.F. Rumyantseva’s idea to use two concepts simultaneously — “kind”, defined through the target function of a source, and “sources of personal origin” — came to be commonly accepted. It was further developed in a textbook on source studies written in 2000. Although its authors based it on the classification by kind, they also mentioned “a complex of materials of personal origin” associated “with personal needs of an individual, manifestations of his or her social participation, intellectual development, professional interests, etc.” [12; 153]. Subsequently, research designs by novice historians included concepts based on the use of the term “sources of personal origin”, which is reflected in their further research. For instance, I.A. Lyutsay refers to “documents of personal origin” as one of the kinds of historical sources, with a reservation that “principal criterion for distinguishing them is their intended purpose” [13. P. 375]. In 2025, A.V. Karabalykova used “sources of personal origin” to study dissent in the USSR, defining them (following M.F. Rumyantseva’s ideas) as “a group of kinds of historical sources” [14].

Despite seemingly universal acceptance of classification by kind as applied to written historical sources, modern researchers have been sporadically using the term “sources of personal origin” in textbooks, PhD theses and scientific articles, thus reinforcing “origin of the source” as a classification taxon.

Let us consider several examples of how the corpus of historical sources has been systematized in source studies reviews of some PhD research.

In 2003, E.E. Abdrashitov presented a PhD thesis, specifically devoted to the study of “sources of personal origin”, a group in which the researcher included “private letters and memoirs” [15. P. 3]. In determining epistemic significance of information obtained from the studied sources of personal origin, the author made a reasonable conclusion that such information will be of considerable interest for further historical and cultural research. However, the author’s next conclusion — that “**objectively presented potential information** on the transformation of consciousness in Russian soldiers and officers in the midst of war and captivity...” (emphasis added — Author) will be especially significant — raises some doubt.

It should be noted that in academic literature it is customary to view subjective uniqueness of information as a principal token of increased cognitive value of memoirs, while the presence of objective information in them is questioned or even completely rejected. E.V. Tarle, who himself actively introduced memoirs into his works, still admitted that sources of this type are characterized by bias (subjectivity) and “a completely conscious intention to show the reader people and events only at a certain angle: to reveal one thing, hide another, distort a third” [16. P. 102]. In addition, all types of historical sources (regardless of their origin) contain potential information, and whether this information is revealed or not results from a competent study, which, in turn, closely correlates with the researcher’s proficiency in the methods of critical analysis of primary sources.

In theses aimed at studying the life and work of individual socio-political figures, i.e. in studies of a biographical nature, it is possible to use historical materials under the term “sources of personal origin”. Thus, in the 2019 PhD thesis dedicated to V.M. Florinsky in addition to memoirs and diaries, this group of sources included (erroneously) personal and official (!) letters of the philosopher, which in fact belong to two other kinds of sources — epistolary and office documents [17. P. 13].

Another PhD research on Russia-Spain cultural ties according to its author is based on information from four kinds of sources: *regulatory, administrative, journalistic and personal documents* [18]. However, only the first three of these categories of historical sources can be referred to as classification by kind, while the last group is selected based on their “origin”, which represents a different principle of classification.

Uniting memoirs, diaries and personal correspondence into a single category called “sources of personal origin” is quite common in articles.

In 2006, N.I. Ivanova published an article under the title that united opposite, mutually exclusive concepts used in the classification of historical sources — “kind” and “origin” [19. P. 105]. It should be noted that a parallel use of the concepts “origin” and “kind” is not in line with the conceptual approach adopted in classification by kind, since the kind of a source is determined not by its origin

in a particular environment or from a particular author, but by the function that the source is intended to perform. However, conducting an analysis of sources of personal origin (as defined by the author of the article), N.I. Ivanova specifically indicated that when studying such documents it is necessary to adhere to the concept of their purpose, a principle that classification by kind is based upon.

In 2014, S.V. Kodan combined two directly opposite principles of classification of historical sources — by their origin and intended purpose. “Distinguishing sources of personal origin within the corpus of historical information carriers is based on classification by kind”, as the author assured the reader, albeit he himself united all types of biographical sources (memoirs, diaries, personal letters) under one term “sources of personal origin”, defining this entire group of sources as a single “kind” [20. P. 60].

In 2017, S.V. Kodan went further in combining sources of different types, defining three perspectives on the study of personal sources. The first is informational, consistently embodying a pragmatic dimension and encompassing a multifaceted array of source materials, ranging from “legislative documents and juridical acts”, to “personal correspondence”, and extending to “autobiographical narratives and introspective memoirs”, all of which serve the objective of fostering self-expression, self-awareness and individual self-empowerment of the subject in question. The second is biographical, providing “the opportunity to explore and juxtapose the sources of personal origin alongside the trajectory of their author’s life”. The third is communicative, associated with the examination of personal sources within the framework of “human individualization”. In terms of cognitive value of personal sources, the author concurred entirely with the perspective suggested by M.F. Rumyantseva, positing that such sources serve as “the most coherent embodiment of an individual’s self-awareness and the development of interpersonal dynamics”, and are represented by such media as “diaries, private correspondence (epistolary sources), memoirs..., essays, confessions” [21].

Conclusion

To sum up, the question of whether it is appropriate to employ the term “sources of personal origin” comprising various kinds of sources in source studies writings, scientific literature, and PhD research necessitates a definitive negative answer. Historical sources should be categorized based on a singular, coherent criterion in line with the principles of formal logic.

However, we admit that the use of the classification taxon “origin” is possible in a situation where all sources involved in the study are categorized according to the same principle — place of creation or authorship. Conversely, if some sources are classified by kind, while the others as sources of personal origin, such an infringement on classification principles is absolutely unacceptable.

Growing interest within contemporary society encompasses not merely historical events, but also personal narratives of people from bygone times, their thoughts and feelings, actions, psychology, changes in self-awareness and worldview, which can be regarded as a reflection of a wider trend towards humanization of Russian historical knowledge. This will inevitably lead to a deliberate integration of novel biographical sources spanning various historical epochs into the academic corpus. Search in archives and further publication of various forms of these materials — more often based on vivid recollections of individuals and less often on the preservation of documentary evidence — will significantly enrich the field of historical inquiry and their study will qualitatively expand the scope of historical knowledge.

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