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*Natalia Kobchenko (Наталя Кобченко)*  
<https://orcid.org/0000-0003-4369-5909>

## VERBALISATION OF AN ALTERNATIVE ACADEMIC POSITION IN TOTALITARIAN DISCOURSE

*Abstract*

### ВЕРБАЛІЗАЦІЯ АЛЬТЕРНАТИВНОЇ НАУКОВОЇ ПОЗИЦІЇ В ТОТАЛІТАРНОМУ ДИСКУРСІ

**Background.** *In Soviet Ukraine, academic discourse often acted as a means of implementing language planning, in particular as a tool for the transformation of the language corpus. All grammar textbooks published after 1933 broadcast the official knowledge: the vocative is not a full-fledged case, but rather a special form of address; morphological means of expressing address in Ukrainian are the “vocative form” and “nominative case.” In the conditions of total control over all areas of social life, Ukrainian linguists were faced with a choice of either 1) look for certain language devices, broadcasting the official theory, which would convince the addressee to believe in the talking points that did not fully comply with the language facts, and then anchor those points in their consciousness; 2) avoid aspects that disagree with the language practice or the logic of academic description; 3) word the findings of their research and observations of the language practice in a way that would not contradict the official theory.*

**Contribution to the research field.** *The article is dedicated to the analysis of the communication practices used by Ukrainian linguists in the Soviet times to*

*express their academic position, which did not agree with official knowledge. The object of comprehension was a unique for postcolonial societies situation in which the creators of both the official discourse and the alternative discourse opposed to it were the colonised themselves.*

**Purpose.** *The aim of this research is to analyse ways and means of verbalisation of the alternative academic position held by linguists in the academic discourse of the totalitarian era, based on the materials representing the topics “The Case System” and “Address” in Ukrainian grammar books for higher education, published between 1933–1991.*

**Methods.** *The research is based on the theoretical and methodological foundations of postcolonial studies, which involve a critical reading of texts that reflect the influence of various forms of authority on the life of subordinate communities. In particular, the theory of critical reading of J. Errington’s linguistic works and R. Vodaks’ methodology of discourse-historical approach, which has been adapted for academic discourse analysis, have been applied in this research.*

**Results.** *Some linguists, who did not share the canonised theory of the vocative, implied their point of view in the official texts they had created (i.e. textbooks for higher education.) On the one hand, they used official terminology and theoretical concepts: they were consistent in naming the vocative case a “vocative form,” and presented two ways of expressing address. On the other hand, the lexical and grammatical structure of their statements levelled the postulates regarding the fact that “vocative is not a case”, and that “the nominative case is used to express address on par with the vocative.” Among the techniques used by the linguists, heavily euphemistic speech in combination with syntactic complication of the structure prevailed, as well as splitting nominations by verbalising the concept with variant naming and violation of logical connections between consecutive statements. Such individual practices of linguistic resistance replicated the practices of the official totalitarian discourse, but with the aim to broadcast the opposite meaning.*

**Discussion.** *The peculiarity of the alternative academic discourse (in particular, the language education one) of the totalitarian era lies in the fact that it did not directly confront the official theory, but rather occurred within its boundaries. This gives a reason to consider some Ukrainian linguists of the Soviet period as creators of both colonial and anti-colonial discourses.*

**Keywords:** academic discourse, language education discourse, language planning, discourse-historical approach, postcolonialism, euphemism, implicatures, vocative, grammar, Ukrainian language.

*Статтю присвячено аналізу комунікативних практик, які застосовували українські мовознавці в радянські часи, щоб висловити свою наукову позицію, яка не збігалася з офіційним знанням / канонізованою теорією. Аналіз проведено на матеріалі теоретичних відомостей про вокатив і засоби вираження звертання, викладених у граматиках української мови для вищої школи, опублікованих протягом 1933–1991 рр. Показано, що автори деяких підручників свою кваліфікацію вокатива як повноцінного відмінка, яка суперечила офіційному знанню, висловлювали імпліцитно, вдаючись до евфемізації, зайвого синтаксичного ускладнення, розщеплення номінації. Щоб не сприяти розхитуванню норми щодо вираження звертання, деякі автори, окреслюючи це питання, замість терміна «називний відмінок» уживали описові конструкції, що містили слово «називний», проте прямо на нього не вказували. З'ясовано, що особливість академічного альтернативного дискурсу тоталітарної доби полягає у тому, що він функціював у межах офіційного.*

**Ключові слова:** академічний дискурс, лінгводидактичний дискурс, мовне планування, дискурсивно-історичний підхід, постколоніалізм, евфемізм, імплікатура, вокатив, українська мова.

## 1. Introduction

The defining feature of the USSR's language policy was to ensure the dominant status of the Russian language in all republics, which the authorities used as a means of integrating the multinational population into a socio-culturally homogeneous mass. In Soviet Ukraine, there was an additional ideological basis for the implementation of the language policy directed at “bringing closer the brotherly languages” — Russian and Ukrainian. It resulted in the planning of the corpus of the Ukrainian language, as well as its status, becoming strategic tasks for the Soviet authorities. The realisation of this task was achieved through the codification of new orthographic and grammatical norms and compilation of new terminological and translation dictionaries, namely the Ukrainian-Russian/Russian-Ukrainian ones. Another way of planning the corpus of the Ukrainian language was the establishment of certain linguistic concepts which interpreted specific grammatical phenomena in the Ukrainian language as being identical or very close to the Russian ones. Thus, linguistics as a science, and language education as a unity of content and the methods of teaching have become some of the tools for “reconstructing” the Ukrainian language system.

That is why Ukrainian Soviet linguistics, along with other humanitarian areas, is in dire need of decolonization. The urgent task facing scholars is to reconsider the theories canonised in academic discourse, which sometimes did not align with the trends in the development of the Ukrainian language or language practice. It is important to comprehend not only what renowned linguists of the Soviet period wrote about certain theories and linguistic facts but also to analyse how they wrote about them, to try to “read off” their academic position. The realisation of this task will enable a measured assessment of the academic achievements of Ukrainian linguists of the Soviet period and the influence of their theories on modern Ukrainian linguistics, as well as assist with an adequate interpretation of complex grammatical phenomena. For Ukrainian linguistics, this will be a way out of the colonial discourse (transcending the borders of the knowledge of oneself imposed by the empire) and at the same time a step away from the anti-colonial discourse (levelling some linguistic achievements of the Soviet period, accusing Soviet linguists of bias) to the postcolonial discourse (looking at Ukrainian linguistic works of the Soviet period through the socio-historical prism of the era, interpreting them in the context of canonising certain academic theories).

## 2. Theoretical background

When studies devoted to the study of the government’s activities regarding the language situation in the country and its impact on language development first began to appear, there was no consensus among researchers on the correlation between the concepts of “language planning” and “language policy.” Some used these terms as synonyms, while others insisted on differentiating them; the hierarchical relationship between them was defined differently. Today, this issue is no longer fundamental, because these concepts are so interconnected that they have become the basis for the formation of a separate interdisciplinary areas of research — language policy and planning (Bastardas-Boada, 2013; Johnson & Ricento, 2013, pp. 13–15; Wright, 2012; Stemper & King, 2017; Tollefson & Pérez-Milans, 2018). However, in order to ensure the logic of the information presented here, we consider it necessary to outline our understanding of these concepts. The definitions offered by B. Spolsky, according to whom, language policy encompasses: (1) language practices, (2) language beliefs or ideologies, and (3) planning, or management <sup>1</sup>, — “efforts

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<sup>1</sup> The researcher uses the term “language management” rather than “language planning.”

by some members of a speech community who have or believe they have authority over other members to modify their language practice” (Spolsky, 2012, p. 5) appear to be the most appropriate. Thus, language policy is understood as a governmental strategy for ensuring a certain status of a language, areas and forms of its functioning, as well as standards of its use that correspond to the structure of this language and the patterns of its development; and language planning is a set of tactics for implementing this strategy.

There are three directions which are traditionally distinguished in language planning: 1) status planning; 2) corpus planning; 3) language acquisition (language education planning) (Fettes, 1997, pp. 14–19; Wright, 2012; Stemper & King, 2017, pp. 657–658; Tollefson & Pérez-Milans 2018, pp. iii–iv). Some researchers add the fourth direction — planning the prestige of the language (Azhniuk, 2021, pp. 7–8). This research considers the “language prestige” to be a part of the “language status,” thus a three-component structure of the language planning has been analysed in the given paper. As a rule, the aim of language planning is characterised in a positive way: the development of a language, the expansion of its areas of functioning, its establishment as an official language, the prevention of language conflicts, etc. However, the study of the language planning in Ukraine in the period between 1933–1991 (Shevelov, 1989; Masenko, 2004; Karunyk, 2017 among others) demonstrate that its objective can be negative, namely the displacement of the language from the communicative medium of the social community or changing its corpus in order to unify it with another language.

Generally, planning the language status and, in particular, the language corpus precedes the implementation of language education. After all, it appears logical that one of the tasks of language education is to help speakers master the language standard — a normalised corpus of the language. However, the Soviet government sometimes used language education as a tool for planning the language corpus. This strategy of changing the Ukrainian language corpus is demonstrated by the example of the vocative case. At the time of the establishment of Soviet rule, the Ukrainian language had a single norm of expressing address, the vocative case, as evidenced by the grammars published prior to that time (Wagilewicz, 1845, pp. 138–139; Ohonovskiy, 1889, pp. 181–182; Krymskiy, 1907, p. 35; Smal-Stockyi & Gartner, 1914, p. 65; Simovych, 1919, p. 150). In the grammar books of the 1920s, this norm was unanimously codified, whereas all the grammar books for school and university, published after 1933, suddenly proclaim a dual norm for expressing

address — the vocative and the nominate cases. Moreover, all of these grammars “deprive” vocatives of their case status and interpret them as a “vocative form” (see more in Kobchenko, 2021.) Thanks to education and due to the dominating influence of the Russian language in society, the nominative case used in the function of address is gaining popularity in the language practice of Ukrainians, marginalising the vocative (see Dudyk, 1973, p. 269; Horodenska, 2017, pp. 40–45). This led to a change in the use of the address, and thus the change in the language corpus as a whole.

Thanks to R. Cooper, a tendency has been established in the specialised literature to distinguish three types of the corpus planning — graphisation, standardisation, and modernisation (Cooper, 1996). Having analysed the language situation in Croatia after it restored its independence, A Peti-Stantić added one more type of planning to the classification — re-standardisation (repeated standardisation). She classifies this notion as a process of transformation of the corpus of the language, which had undergone the process of standardisation in the days of political oppression. The essence of this change lies in the “return” to the “old” language corpus — the corpus that existed before the standardisation — based on the fact that “according to many,” during the initial standardisation the language norm was assessed and established inaccurately<sup>2</sup> (Peti-Stantić, 2009, pp. 75–77.) The study of the Soviet experience provides grounds for complementing these processes with yet another one — de-standardisation, which can be interpreted as a controlled undermining of the language norm formed in the previous period through language education. That is, to illustrate this process with an example of the Ukrainian vocative case, de-standardisation is prescribing a new language norm in grammar textbooks, as well as canonising a certain theoretical concept, intended to legitimise this new norm.

It is logical that the key role in corpus planning is played by expert linguists, who have to codify the relevant language norms based on their study of the internal patterns of the language development and its usage. However, in the conditions of total control over all areas of social life, the role of the academic community was reduced to broadcasting official theories and declaring the language norms, established by the resolutions of the Commission of the People’s Education Commissar — “to check the work on the language

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<sup>2</sup> “What has changed is the valorization of the literary-linguistic or intellectual superstructure, i.e. the fact that precisely this valorization was, in the opinion of many, “wrongly set” during the initial standardisation” p.77.

front” (resolutions are in Masenko, 2005, pp. 140–152.) Therefore, Ukrainian linguists and linguodidactics scholars of the Soviet era were not subjects, but tools for implementing the language policy of the USSR and fulfilling the language planning. Under those circumstances, they often faced the choice of one of these discursive practices: 1) to look for certain language devices, broadcasting the official theory, which would convince the addressee to believe the talking points that did not fully comply with the language facts, and then anchor those points in their consciousness; 2) to avoid aspects that disagree with the language practice or the logic of academic description; 3) to word the findings of their research and observations of the language practice in such a way that would not contradict the official theory. The latter discursive practice can be considered a certain form of resistance to the language planning of the Soviet era.

Scientists have already studied means and forms of counteracting totalitarian discourse, identifying them as language self-defence (Vezhbicka, 1993), language resistance (Kahanov, 2012; Renchka, 2022b), alternative discourse (Zaretskyi, 2008), anti-totalitarian communication (Renchka, 2022a). Therefore, there are works which highlight practices of linguistic resistance to various types of totalitarian discourse, such as literary, journalistic and everyday ones (Vezhbicka, 1993; Zaretskyi, 2008; Ksonczyk, 2011; Kahanov, 2012; Renchka, 2018b, 2022a, 2022b.) The issue of the language resistance is also discussed in the context of studying the language situation of the countries that have the experience of the colonial past, or language practices of national minorities and ethnic groups (Ngom, 2002; Deumert & Mabandla, 2018; Dube, 2020; Baioud & Khuanuud, 2022). There are studies of individual practices of language resistance of translators (Gupta, 1998; Durmus, 2014) and group practices of social media users (Tan, 2012; Mpofu & Salawu, 2018.)

This paper focuses on the official academic (linguistic and language education) type of discourse in the totalitarian-era Ukraine. The coexistence of the official and alternative discourses in the 1950s–1980s Ukraine has been studied by O. Zaretskyi (Zaretskyi, 2008.) He characterised the peculiarities of the official academic type of discourse based on the analysis of the Ukrainian Soviet Encyclopedia, the specifics of the alternative academic type of discourse, on the other hand, are not covered in this work. The scholar characterised alternative discourse of the totalitarian period as fragmentary and mosaic-like (Zaretskyi, 2008, pp. 17–19). Clearly, this is due to the fact that it is formed by a set of products of individual communication practices, so it is important

to study these individual practices. I. Renchka has analysed the practice of resistance to the language assimilation policy of the USSR in the area of lexicography on the material of Oleksa Tykhyi's *Dictionary of Words that Do Not Meet the Norms of the Ukrainian Literary Language* (Renchka, 2018b). However, since the dictionary was known to neither mainstream speakers nor to the academic community, due to the fact that the only copy was in possession of different people until 2009 (Renchka, 2018, p. 84), it cannot be considered a fragment of the discourse of that period. It was rather an embodiment of an individual's resistance to totalitarian pressure. With regard to the question of the coexistence of official and unofficial knowledge in the totalitarian society, it is important to continue researching language resistance to the official knowledge and forms of verbalisation of unofficial knowledge. Therefore, the aim of our study is to analyse the ways and means of verbalising the alternative academic position of linguists in the academic discourse of the totalitarian era.

### 3. Materials and methods

Theoretical data about the vocative case, presented in the Ukrainian grammar books of the Soviet period, have been chosen as materials for the given analysis. This choice has been determined by the peculiarities of representing the grammatical status of this form in different historical periods. According to A. Zahnitko, “a modern Ukrainian vocative case requires to be considered in the evolutionary and prospective, formal and grammatical, semantic and syntactic, and functional and communicative dimensions” (Zahnitko, 2020, p. 131.) It is evolutionary and prospective dimensions that are of particular interest to us. It concerns not only the qualification of the grammatical status of the vocative (whether it is a case or not) but also the motivated and unmotivated codification of its competition with the nominative. The results of our previously conducted studies suggest that in all Ukrainian grammar books, published up to 1933 and after 1991, the only form to express address was the vocative case, whereas the use of the nominative case in this function was qualified as the violation of norm, caused by the influence of the Russian language. In the grammars of 1933–1990 a dual form was declared possible: address could be expressed via “vocative form” or the nominative case. As far as the grammatical status of the vocative is concerned, all the grammars published up to the 1920s and after 1991, declare it a full-fledged member of the case paradigm. In the 1920s grammar books two approaches can be noted:



1) the vocative is a case like the other cases; 2) the grammatical nature of the vocative is slightly different from the rest of the cases, thus it is a special form in the noun inflection. However, in the grammars of the 1933–1990 the vocative was stripped of its case status and named a “vocative form” (see more in Kobchenko, 2021; Yasakova, Kobchenko & Ozhohan, 2022.) In the Soviet period, the first linguist to have directly verbalised the arguments in favour of the case status of the vocative was I. Kucherenko, in his monograph “Theoretical Questions of the Grammar of the Ukrainian Language” (Kucherenko, 1961, I, p. 135), followed by I. Matviias (Matviias, 1974, p. 22) and I. Vykhoivanets (Vykhovanets, 1987), who presented a similar concept of the vocative in their monographs. The only language education publication of the Soviet period which presented this approach was a textbook for higher education by M. Leonova, published in 1983 (Leonova, 1983, pp. 53–54.)

This research is based on theoretical and methodological foundations of the postcolonial studies, which involve critical reading of the texts that reflect the influence of various forms of authority on the life of subordinate communities and on their representatives’ collective and individual way of thinking. In contrast to other branches of the humanitarian sciences, the postcolonial approach in linguistics is still a work in progress. One of the first, if not the first, linguistic disciplines in which the postcolonial approach has been applied consciously and consistently is pragmatics. Thanks to the works of Richard W. Janney and Eric A. Anchimbe, a new stream — postcolonial pragmatics — has been formed, which acted as opposition to the research methods formed by J. Austin, J. Serl and P. Brown, and S. Levinson, who in their works used communicative practices of western societies as a fact-based platform. In 2011, the *Journal of Pragmatics* dedicated a special issue to the problems of postcolonial interaction, and has since published many works on the subject. The research object of postcolonial pragmatics is intermixed languages and communicative practices, and the aim “does not attempt to eliminate differences between multilingual non-Western pragmatic practices and monolingual Western ones in search of underlying pragmatic universals; rather, it seeks to focus precisely on these variant features and explain their social and cultural significance” (Anchimbe & Janney, 2011, p. 1451).

An important step in the formation of postcolonial linguistics was the establishment in 2019 of the specialised journal *Postcolonial Linguistics*, whose first issue was dedicated to outlining the theoretical and methodological foundations and the problematic aspects of this area of study. The aim of post-

colonial linguistics was formulated in the programme article of the issue, and is as follows “to study language and linguistic practices in postcolonial contexts and to engage critically with the way in which we do linguistics” (Levisen & Sippola, 2019, p. 2).

There is no unanimity among linguists in this field regarding the interpretation of the notion of “postcolonial.” The founders and chief editors of the aforementioned journal define this concept in two ways: 1) descriptive-causal, which involves the study of the language in both diachronic and synchronic aspects as “integral to the colonial matrix of power and the orders of knowledge in the postcolonial era,” 2) critical-reflective, which involves the study of language processes in postcolonial societies (Levisen & Sippola, 2019, p. 2). Thus, it appears that the basis for the first approach is the aim of the research, whereas for the second one it is the time and geographical scope of the studied phenomenon. According to Ingo H. Warnke, the semantics of the component *post-*, apart from pointing at “still occurring” consequences of postcolonial structures, also embraces temporal and modal aspects. On the one hand, postcolonial means ‘something happening after the colonial’, and on the other hand, ‘something connected to the radical rejection of the colonial mindset’ (Warnke, 2019, p. 44).

Despite the fact that postcolonial linguistics, as a field of study, has started to form only recently, a few areas of concern have already been established, i.e. historiography of the linguistics, pragmatics, semantics, modern sociolinguistics, contact languages, linguistic anthropology and anthropological linguistics, and applied postcolonial linguistics (Levisen & Sippola, 2019, pp. 4–7). Among these directions, a special place belongs to historiography of linguistics. Quoting Yu. Sheveliov who said that, “every language is a devilishly dangerous witness of the history of the nation where this language is spoken” (Shevelov, 2009, p. 287), it can be added that metalanguage is just as dangerous of a witness. Since metalanguage is a means of the language description, it, essentially, interprets “testimony of the witness of history.” Thus, linguists appear as certain interpreters of history through their works, and interpretations, as it is known, depend on the circumstances in which the interpreter grows up and finds themselves at present. J. Errington, who is considered to be a classic of postcolonial linguistics, states that works on language, created over four centuries by colonisers, including grammar books, dictionaries, and “related texts,” now constitute a significant part of the colonial archive. According to the scholar, “They count very obviously as reports on

work which made languages objects of knowledge, so that their speakers could be made subjects of power” (Errington, 2008, p. 3.)

Other linguists also insist on the importance of studying the metalanguage through the prism of postcolonialism. Moreover, S. Makoni and A. Pablé substantiate the moulding of the historiographical direction of postcolonial linguistics into a separate discipline — decolonial linguistics (Makoni & Pablé, 2022, pp. 1–2). In their opinion, the concepts of European linguists were affected by the socio-political factors of the era they lived in, thus the academic paradigm formed by Europeans ought to be rejected in the study of the languages of the former colonies.

Other fields of humanities have already questioned the appropriateness of applying postcolonial methodology to the interpretation of the past of the Ukrainians and social processes in contemporary Ukraine. The achievements of history, cultural studies, and literary criticism demonstrate that this approach is justified (Pavlyshyn, 1997; Hundorova, 2012; Hisem, 2016; Aheieva, 2021.) The justification for Ukraine’s colonial status in the Russian Empire and the Soviet Union (being somewhat different from that of classical colonies) has already been mentioned by researchers in different fields of humanities, including linguistics. This paper fully supports the stance taken by N. Yasakova, who convincingly argued for the feasibility of applying a postcolonial approach to the study of the consequences of language policy and language planning in Soviet-era Ukraine (Yasakova, 2023, pp. 135–142.) Moreover, postcolonial linguistics has already established a broad understanding of the concept of “colonialism” as the domination of people, anywhere in the world, who act superior due to certain factors (e.g. wealth, white race, male gender, heterosexuality, etc.) in contrast to people who do not possess these features (Faraclas & Delgado, 2021, p. 4).

With regards to this, J. Errington’s theory of critical reading of linguistic works (Errington, 2008) appears to be applicable to understanding language planning in Soviet Ukraine. Ukraine’s special status in Soviet times, in terms of “coloniser — colonised,” definitely led to a special situation in the realm of language policy and planning. At the time of the installation of Soviet rule, Ukrainian had already formed an established language standard and extensive linguistic description, which can be proved by a range of works in grammar and lexicography published during the 19<sup>th</sup> — beginning of the 20<sup>th</sup> centuries. What is important is that the authors of those works were Ukrainians — the colonised ones. The new, or rather “updated,” coloniser — the Bolsheviks — did not create the description and standard of the language of the colonised nation (Ukrainian),

subconsciously guided by the model presented by their own language (the language of the metropolis). They “edited” the structure of the colonised nation’s language, consciously using the structure of their language (Russian), thus changing well-established and codified norms. In this research paper, a critical reading of the Soviet-era linguistic works is directed at revealing mechanisms of “de-standardisation” of the Ukrainian language and practices used to resist this process. What is interesting is that the authors who reflected both of these phenomena were again Ukrainians, the colonised ones. Therefore, understanding of colonialism, as expressed by M. Pavlyshyn, appears to be relevant here. He regarded colonialism as “ideology that influences people and institutions in such a way that they accept the imperial structure of dominance as a given, reinforcing it by their behaviour” (Pavlyshyn, 1997, p. 225.)

Postcolonial linguistics uses discourse as a key to studying the outlined aspects. Understanding of the concepts of “colonial discourse” and “anti-colonial discourse” is also based on M. Pavlyshyn’s interpretation (Pavlyshyn, 1997, pp. 225–232.) Colonial discourse is understood as directed at strengthening the structure of imperial dominance, and anti-colonial is aimed at resisting or rejecting it. Since the object of our analysis is academic works of the Soviet era, the notion of official discourse of the totalitarian society is used here on par with the notion of colonial discourse, whereas the notion of alternative discourse correlates with the idea of anti-colonial one.

Since the methodology of postcolonial linguistics is largely based on the principles of critical discourse analysis, it is to be used in the given research. The methodology of discourse-historical approach, first used and developed by R. Wodak (Wodak, 2001), has been adapted for the analysis of the material. The researcher defines it as “an interdisciplinary, problem-oriented approach which analyses the changes of discursive practices over time and in various genres” (Profile). Linguists who use this approach, consider written and oral communication to be forms of social practice and assume dialectical connection between discursive practices and situations they are built into (Catalano & Waugh, 2020, p. 173.) According to R. Wodak, in order to minimise the risk of being biased when conducting a discourse-historical critical analysis, one should adhere to the principle of triangulation. This principle, in fact, represents the stages of the analysis, covering the following:

1. “Text or discourse immanent critique,” aims at discovering inconsistencies, (self-)contradictions, paradoxes and dilemmas in the text-internal or discourse-internal structures.”

2. “Socio-diagnostic critique,” which takes a researcher beyond the boundaries of textual or internal realm of discourse per se, and reveals — manifest or latent — persuasive or manipulative character of discursive practices.
3. Prognostic critique, which involves providing recommendations that will facilitate transformation and improve communication (Wodak, 2001, p. 65).

The realisation of these stages involves: 1) identifying “the specific *content* or *topic(s)* of a specific discourse”; 2) investigating the “*discursive strategies*,” and 3) examining “the *linguistic means* (as types) and context-dependent *linguistic realisations* (as tokens)” (Catalano & Waugh, 2020, p. 175).

Despite the fact that the author of the discourse-historical methodology develops it on the material of discourses representing social problems and processes, this procedure is fully applicable to the analysis of Ukrainian academic discourse. After all, as previous studies have shown (e.g., Renchka, 2018a; Kobchenko, 2021; Yasakova, Kobchenko & Ozhohan, 2022; Yasakova, 2023), the interpretation and representation of certain linguistic phenomena in linguistic works, as well as strategies and tactics of presentation, have changed along with the changing socio-political conditions in Ukraine.

With regard to the aforementioned and the aim of our research, the adapted methodology of discourse-historical critical analysis is to be applied here: 1) tracing the coverage of the topic “Grammatical Status of the Vocative and Linguistic Norm of Expressing Address in Ukrainian” in the grammar books published between the 19<sup>th</sup>–21<sup>st</sup> centuries; revealing differences in the representation of these issues in various historical periods, i.e. from the 19<sup>th</sup> century till 1933, during 1993–1991 and from 1991 till present; 2) establishing discursive strategies of verbalising this topic in Ukrainian grammar books of the Soviet period and identifying ways of expressing an alternative position to the canonised theory (official knowledge); 3) analysing language means of expressing an alternative position.

#### **4. Communicative Practices of Resistance in Language Education Discourse (based on the materials highlighting the functional status of the vocative)**

Inspection of the Ukrainian language textbooks and manuals, in the language education discourse of the Soviet period, revealed that the use of the name “vocative form” to denote a vocative was mandatory and the only

possible<sup>3</sup>. Obviously, the purpose of institutionalising this term was to plant deeply the theory of a different grammatical nature of the vocative compared to other cases and, consequently, of a six-component case system. In this way, the proof of the closeness of the grammatical system of the Ukrainian language to the “brotherly” Russian language was constructed. And the loosening of the linguistic norm regarding the morphological expression of address was clearly aimed at displacing the vocative from linguistic practice and, in the long run, causing its decline.

In some textbooks, however, it is possible to encounter a definition that implies an alternative to the canonised theory view/an anti-colonial view. On the one hand, some of the underlying features of the academic style are unambiguity, clarity (understandable definitions), accuracy and brevity of expression, and appropriateness. According to P. Selihey, “the devices of the academic style ought to give the author a possibility to share the obtained knowledge in an accurate and convincing manner, and enable the reader to find their way in the text easily, comprehend and master its contents deeply” (Selihey, 2016, p. 75.) On the other hand, in order to convey their view on the grammatical status of the vocative, which differed from the canonised theory, the authors of textbooks sometimes resorted to the unlikely for the academic style techniques — unnecessary complication of the sentence by introducing descriptive constructions, replacing clear definitions with euphemisms, splitting nominations by verbalising the concept with alternative definitions, breaking logical connections between statements and the conclusions derived from them. A curious feature of these practices was that the authors, while implementing them, simultaneously used official/colonial terminology, in particular, the term “vocative form” was widely used to refer to the vocative. Such communicative practices contributed to the formation of implicatures, semantic emptying of the official term, and encouraged an attentive addressee to question the “articulated” theses and draw their own conclusions.

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<sup>3</sup> We differentiate between linguistic and language education discourses, since the texts that represent them differ slightly in the aim of creation, the manner and depth of information presentation, and the target audience. As noted in the theoretical part of this paper, the view of the vocative as a case (and, thus, the term “vocative case”) is presented in the monographs by I. Kucherenko, I. Matviias, and I. Vykhovanets. However, these works represent a linguistic discourse, and their target audience is much narrower than that of secondary and higher school textbooks, so they were able to influence language education planning only indirectly and sporadically. M. Leonova’s textbook, which treated the vocative as a case, appeared only in the early 1980s, when the theory of the “vocative form” seemed to be a postulate due to its long and massive replication.

Among the aforementioned forms of the language resistance, euphemisation of the presentation is of particular interest to us. Numerous research findings suggest that this was one of the key practices of totalitarian discourse, through which the authorities influenced the mass consciousness, changing the perception of reality (Young, 1987, pp. 241–249, 383–388; Zaretskyi, 2008, p. 43, 49; Masenko, 2017, pp. 19–42; Vodenicharov, 2020.) Ukrainian linguists, however, used the same practice, pursuing an opposite aim — to convey a view constructed with the help of arguments and cause and effect relationships.

### *1. Verbalisation of the Alternative Position on the Grammatical Status of the Vocative*

It is interesting to trace the way the information about the vocative was formulated in various works by I. Matviias. In a 1962 textbook on morphology for distance learning students of pedagogical institutes, the linguist avoids an unambiguous naming of the number of cases, suggesting that a recipient do a mathematical operation of addition instead:

[U suchasniy ukrayinskiy movi isnuye shist vidminkiv, do kozhnogo z yakykh stosuyutsya pevni pytannya, ta odyn (klychna forma), shcho vidpovidnoyi formy pytannya ne maye] There are six cases in the modern Ukrainian language, each of which has a certain question, and one (the vocative form) that does not have a corresponding question (Matviias, 1962, p. 26).

Placing the phrase “six cases” (which the researcher uses to indicate nominative, genitive, dative, accusative, instrumental and locative) in the coordinate line with the word “one” (to name the vocative) suggests that they indicate semantically close notions. In this way, the author implies the existence of seven cases, one of which is different from the rest. The phrase “vocative form”, which is given in brackets, helps to disguise this idea and present the statement as being in compliance with the canonised theory. It is also unknown whether the relative pronoun *that* (*shcho*) was used intentionally or unconsciously to add the subordinate attributive part to the component *one* (*the vocative form.*) The relative pronoun *shcho* (*TN. Eng. “that”*), unlike *yakyi/yaka* (*TN. Eng. “that/which”*) does not have formal gender indicators<sup>4</sup>, which

<sup>4</sup> In the Ukrainian language, relative pronoun “shcho” (*Eng. that*) can be used to add a subordinate attributive part to both feminine, and masculine nouns, whereas pronouns “yakyi/yaka” (*Eng. that/which*) are used with either feminine (“yaka”) or masculine (“yakyi”) nouns.

enables the reader, while skimming the text, to interpret it in an ambiguous manner — possibly correlating the subordinate part with either component “one” (i.e. case, TN Ukr. “vidminok” — masculine noun) and the component vocative form (TN Ukr. “forma” — feminine noun.)

In the list of cases, the vocative is identified by two terms — “vocative or vocative form.” Perceiving this statement, a recipient can deduce the implicature “vocative form is the same as case.” However, in the tables with conjugation patterns and in the notes on case endings, only one term is used — “vocative form.” Perhaps, due to the fact that this information appeared visually more conspicuous (the table, wide font kerning for case names), it was challenging to use controversial wording.

I. Matviias is also the author of the chapter “Noun” in the volume “Morphology” of the academic edition of the course on modern Ukrainian standard language edited by I. Bilodid. Information about the grammatical status of the vocative features in this work in two paragraphs — “Category of Person in Nouns” and “Category of Case.” In particular, in the paragraph “Category of Person in Nouns” alongside the rationale concerning the juxtaposition of the nominative case, as carrier of the third-person semantics, to “the vocative form,” as the carrier of the second person, the linguist provides an argument typical for the language education works of the Soviet period:

[Shcho zh do klychnoyi formy, to vona obyektnykh vidnoshen ne vyrazhaye, a tomu vvazhaty yiyi vidminkom mozhna lyshe umovno] Regarding the vocative form, it does not express object relations, thus it is to be considered a case only conditionally (Bilodid, 1969, p. 74.)

However, later in the text the author draws a rather unexpected conclusion from this passage, in which he virtually states a grammatical equality between the vocative and the other cases. This point is verbalised not through an affirmative sentence, but through a structure with a double negation, realised by a modal predicative with the meaning of impossibility (*impossible to consider*) and adverbial syntaxeme with the meaning of the absence of something within given limits (*outside the case paradigm*):

[Otzhe, klychna forma ye elementom osobovo-vidminkovoyi paradyhmy. Oskilky vona protystavlyayetsya formi nazyvnoho vidminka, yiyi **nemozhlyvo rozhlyadaty poza** vidminkovoyu paradyhmoyu] So, vocative form is an element of the person-case paradigm. Since it is opposed to the nominative case form, it **cannot be considered outside** the case paradigm (Bilodid, 1969, p. 74). (bold font — author of this paper N.K.)



A footnote, accompanying this sentence, disguises the linguist's position even further. At the beginning of the sentence, it is said that in the grammar textbooks of those Slavic languages which have special morphological means of expressing the second person in a noun, the vocative is considered an element of the case paradigm, and then the thoughts of the scholars denying its case status are cited.

In the paragraph "Category of Case," I. Matviias, presenting the information on the number of grammemes of this category, uses the term "vocative form" and the definition "six," however instead of the term "case," he uses the compound "case form." The choice of this lexical means, combined with the syntactic organisation of the utterance, gives the recipient the impression that the nominative, genitive, etc., on the one hand, and the vocative, on the other, are units of the same grammatical status. The first sentence states the existence of the six case forms, and the second, built as an adjunct structure, provides information about yet another form like that — the vocative.

[U suchasniy ukrayinskiy movi ye **shist vidminkovykh form**, do kozhnoyi z yakykh mozhna postavyty okremi pytannya. Krim toho, yak uzhe bulo skazano (dyv. stor. 74), **u systemu vidminkovykh form vklyuchayetsya takozh klychna forma**, vzhlyvana dlya vyrazhennya zvertannya] There are **six case forms** in the modern Ukrainian language, each of which can be addressed separate questions to. Besides, as mentioned previously (see p.74), **the system of case forms also includes the vocative form**, used to express address (Bilodid, 1969, p. 76) (bold font — author of this paper N.K.)

Another way to disguise the thesis about the case status of the vocative is marking it with the descriptive expression "optional seventh," and placing it in the syntactic position of an inserted component with a sociative function in relation to the unit "six cases." The adjective "optional" leads to an ambivalent interpretation of the grammatical status of the vocative, and adding the predicative part with the oppositional conjunction "however," which states the conditionality of determining the number of cases, amplifies this effect.

[Ustanovleni shist vidminkiv (z fakultatyvnyym somym) pravylno vidbyvayut systemu vzayemozvyazkiv mizh formamy i znachennyam imennykiv, odnak element umovnosti pry vyznachenni tsyeyi kilkosti vidminkiv dopushchenyy] The established six cases (with an optional seventh one) accurately reflect the system of connections between the forms and meaning of nouns, however the element of conditionality when defining the number of cases is allowed (Bilodid, 1969, p. 77.)

Paragraph “The Meaning of Cases” also includes some information about the “vocative form,” and the author implies the sameness of the grammatical status of the vocative with the rest of the cases, stating the uniformity of their morphological markers:

[Formanty klychnoyi formy odnotypni z vidminkovymy zakinchenyamy i rozhlyadayutsya u skladi odnynnoyi vidminkovoyi paradyhmy] The affixes of the vocative form are similar to the case affixes, and are considered as part of the single-case paradigm (Bilodid, 1969, p. 81).

I. Matviias’s monograph, a genre in which Soviet-era linguists, evidently, felt relatively free, could serve as evidence that the author did implicitly state the interpretation of the vocative as a case. *Noun in the Ukrainian Language*, the work published in 1974, offers a rather different formulation. In spite of the text from the chapter on “Category of Case” virtually repeating the same information as academic grammar, a clear statement of the academic position of the linguist, which prohibits ambiguous interpretations, can be observed here:

[U suchasniy ukrayinskiy movi ye sim vidminkiv: nazyvnyy (z zapytannym do noho khto? shcho?), rodovyy (koho? choho?), davalnyy (komu? chomu?), znakhidnyy (koho? shcho?), orudnyy (kym? chym?), mistsevyy (na komu? na choho?), klychnyy (bez formy zapytannya). Klychnyy vidminok funktsionalno spivvidnosnyy z nazyvnym.

Z ohlyadu na pevnu spetsyfyku klychnoho vidminka porivnyano z inshymy (ne vsi imennyky mayut spetsialnu formu klychnoho vidminka, imennyky v mnozhyni, a takozh atrybutyvni slova — prykmetnyky, zaymennyky, chyslivnyky, diyeprykmetnyky zovsim ne mayut takoyi formy) tsey vidminok chasto (zokrema, v shkilnykh pidruchnykakh) nazyvayut klychnoyu formoyu i do vidminkiv ne zarakhovuyut, khoch dlya ts’oho nema perekonlyvykh pidstav] There are seven cases in the modern Ukrainian language: nominative, genitive, dative, accusative, instrumental, locative <sup>5</sup> (with its specific case questions), and the vocative (which does not have a specific question). Functionally, the vocative case is similar to the nominative.

With regard to certain peculiarities of the vocative case, in comparison with other cases (not all nouns have a special vocative case form, nouns in plural, as well as attributive words — adjectives, pronouns, numerals, participles do not have this

<sup>5</sup> TN The way case questions are formed in Ukrainian does not correspond to how questions are created in English. In Ukrainian, *nominative* indicates the subject of the sentence; “doer” of the action; *genitive* denotes possession; “of”; “s”; *dative* — indirect object, e.g. giving, showing, telling **to** (someone or something); *accusative* — direct object; the focus of the action of the verb; instrumental *denotes* “by means of”, “through the agency of”, “with”; locative *indicates* the place where someone or something is or happens.

form at all), this case is often called (especially in school textbooks) a vocative form, and is not counted as a case, even though there is enough convincing evidence for it (Matviias, 1974, p. 22).

Thus, the analysis of the content and methods of presenting the information about the grammatical status of the vocative in various works by I. Matviias shows a veiled expression of his academic position in two of them — the manual “Course of Modern Ukrainian Literary Language. Morphology” and the chapter on the academic grammar of the Ukrainian language. On the one hand, the linguist uses the term “vocative form” in these works, formally adhering to the canon, but on the other hand, the choice and combination of names to indicate cases and the construction of theses which describe the specifics of the noun paradigm imply a non-canonical interpretation of this term. In particular, the researcher does not explicitly name the number of cases of the Ukrainian language, using instead the euphemisms “six cases and one (vocative form),” “there are six case forms, in addition, the system of case forms includes the vocative form,” “six cases (with an optional seventh one).” Moreover, these studies do not directly define the grammatical nature of the vocative, but the author instead hints at its case status, stating that its features are identical to those of the other cases, such as “the affixes of the vocative are the same as the case endings.”

The use of the term “vocative case” in linguistic works of the Soviet period was apparently a taboo, because in academic grammar, the word “so-called” was used in a footnote accompanying this opinion. This footnote, however, could be interpreted as a means of resistance to the canonised theory, since up to 1982 there was no mention whatsoever of the alternative concept of the vocative in Ukrainian grammar textbooks <sup>6</sup>.

## *2. Resisting the Loosening of the Language Norm*

As stated earlier, the second aspect of language planning regarding the vocative was loosening the norm of expressing address. As already mentioned, the grammars of the Ukrainian language published before 1933 presented the

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<sup>6</sup> Textbook “Grammar of the Ukrainian Language” by Vykhoivanets, Horodenska, and Hryshchenko contains the first mention of this case without offering much detail. The authors note that some linguists consider the “vocative form” to be the seventh case, but they do not see sufficient grounds for this, “primarily because nouns in the vocative form are outside the system of syntactic relations, and thus they do not assume the role of any of sentence members” (Vykhovanets, Horodenska, Hryshchenko 1982, p. 67).

vocative as the only morphological means of manifestation of an address in a sentence. Instead, all grammars published after 1933 declared two morphological means of expressing this function: “the vocative form” and “the nominative case.” However, among the entire scope of textbooks and manuals on grammar for higher education, isolated cases where the authors, citing two morphological means of expressing address, avoid directly attributing this function to the nominative case can be observed. In particular, M. Kulyk and M. Chemerisov (the authors of the relevant section in the multi-author textbook) name the “vocative form” as the first means of expressing address, with the second one being — “a form identical to the nominative case”. This second way is illustrated mainly by sentences in which the address is represented by a plural noun or a nominalised adjective, i.e. units for which the form of the vocative case is homonymic with the nominative form.

The choice of the outlined lexical strategy, yet again, satisfies the demand of the canon — the term “nominative case,” when characterising the means of expressing address, is used, however, the descriptive construction, part of which it has been made of, conveys a totally different meaning. (underlying — author of this paper N.K.)

[Zvertannya mozhe buty vyrazhene: 1) Naychastishe imennykom u klychniy formi: “*Pisne* <sup>7</sup> *moya, ty lety po aulakh*” (Djambul). 2) Imennykom u formi, identychniy z formoyu nazyvnoho vidminka, napryklad: “*Vitayte dni studentski, druzi, vitayte dni, shcho v nykh zhyly!*” (Kryzh.); nazyvnyy zvertannya vidriznyayetsya vid nazyvnoho vidminka pidmeta spetsyfichnoyu klychnoyu intonatsiyeyu]

Address can be expressed: 1) Most often by a noun in the vocative form: “*My song, fly through auls!*” (Djambul). 2) By a noun in the form identical to the form of the nominative case, for example: “*Greet those student days, my friends, greet those days you lived in!*” (Kryzh.); the nominative of the address differs from the nominative case by its specific intonation (Kulyk, 1965, p. 165.)

[Zvertannya mozhe buty vyrazhene:

- 1) Imennykom u klychniy formi (vokatyi): **Tarase** <sup>8</sup>! Ty znayesh: svoho na sobori v Konstantsi ne zriksya i spalenny Hus (Pervomaiskyi); **Chervona Armiye! Zhyttia! Nadiye!** Vid peremoh tvoyikh narod radiye (Pavlo Tychyna).
- 2) Imennykom, substantyvovanyim prykmetnykom, diyeprykmetnykom abo chyslivnykom u formi, identychniy z formoyu nazyvnoho vidminka

<sup>7</sup> “Pisne” — vocative form of the word “Pisnia” — Eng. “song.”

<sup>8</sup> “Tarase” — vocative form of the name “Taras.”

(nominatyvi): *O svitla pamyat, spohad miy*, yavys v dushi, yak bureviy, i do mety vpered poklych, i napynay derzannya kryla, shcho v spadshchynu lyshyv Illich! (Nahn.); *Tryvozhone*, zasny neprobudno, ne rvys v nedobacheni sny (Voron.); *Pershyy, pochynay!*

- 3) Pidryadnym pidmetovym rechenn: *Khto v poli zhyve, khto v lisi zhyve, sterezhsya!* (Lesya Ukrainka)]

Address can be expressed:

- 1) By a noun in the vocative form (vocative): *Taras! You know, at the Council of Constance, Hus, burned at stake, didn't abjure his own* (Pervomaiskyi); *Red Army! Life! Hope! The nation rejoices in your victories* (Pavlo Tychyna.)
- 2) By a noun, nominalised by an adjective, participle, or numeral in the form identical to the form of the nominative case (nominative): *Oh pure memory, my recollection, be an epiphany to my soul, like a tempest, and call me to the aim, and raise the daring wings, a legacy left by Illich!* (Nahn.); *The disquieted, sleep your restful sleep, don't rush into those dreams undreamt* (Voron.); *The first one, start!*
- 3) By a subject-centred subordinate sentence: *[He] who dwells in the field, [he] who dwells in the forest, beware!* (Lesya Ukrainka) (Volokh, 1976, p. 322).

Another technique to avoid stating directly that the nominative case is a means of expressing address, and simultaneously comply with the formal requirements of official discourse, is to mark the nominative with the descriptive phrase “a nominative form used in the meaning of the vocative.”

[Zvertannya vyrazhayetsya *klychnoyu formoyu imennyka* (*druzhe, brate, sestro, respubliko* <sup>9</sup>) *abo nazyvnoyu formoyu, vzhytoyu v znachenni klychnoyi, imennyka ta inshoyi imennoyi chastyny movy, shcho vzhyyvayetsya zamist imennyka* (lyubyy, mylyy, chornobryvyy, pershyy, zaprosHENyy ta in.)] Address is expressed by **a vocative form of a noun** (*friend, brother, sister, republic*) **or by a nominative form used in the meaning of the vocative**, of a noun and other nominal part of speech, used instead of the pronoun (*dear, sweet, black-browed, the first, the invited* etc.) (Medushevskyy, 1978, before table 24).

## 5. Conclusion

The fact that in all grammar books for higher education and secondary schools, published after 1933, in contrast to the grammar books of the previous period, Ukrainian vocative was treated not as a full-fledged case, but a

<sup>9</sup> Druzhe — a vocative form of “druh,” “brate”— a vocative form of “brat,” “sestro” — a vocative form of “sestra,” “respubliko” — a vocative form of “republika.”

“special form”, and when expressing address a dual norm (vocative and nominative) was pronounced, may suggest the establishment of this concept as official knowledge. It is evidenced by the fact that there was no information provided on the other qualification of the grammatical status of Ukrainian vocative in the language education works of that time.

However, authors of some textbooks, who apparently did not share the official knowledge about the vocative, presented their academic stance in such a way that the formal means of its representation did not contradict the criteria of the canonised theory. They consistently used the term “vocative form” to indicate the vocative, and provided two ways to express address. However, the lexical and grammatical structure of their statements levelled the asserted postulates about the “vocative not being a case,” and that “the nominative case on par with the vocative is a norm for expressing address.” Among the practices used by the authors to express an opinion different from the official standpoint, euphemisation of speech combined with syntactic complication of the structure prevailed. In particular, the thesis ‘vocative is a case’ is implied in statements such as “*the system of case forms also includes the vocative form,*” “*the formants of the vocative form [...] are considered as part of a single-case paradigm,*” *it [the vocative form] cannot be considered outside the case paradigm.*” The thesis about “there are seven cases in the Ukrainian language” is disguised in structures such as, “*There are six cases in the modern Ukrainian language, each of which has certain questions, and there is one (the vocative form) which does not have a certain question,*” the thesis “the nominative case is not a normative way to express address” — in the statements “*a form identical to the nominative case,*” “*a nominative form used in vocative meaning.*” The splitting of nominations by verbalising the concept with alternative names (*the vocative form — the optional seventh, the case system — the system of case forms, six cases and one (vocative form)* etc.), and violation of logical connections between consecutive statements can also be observed.

The above mentioned practices were also used as regular tools of the official totalitarian discourse. However, while serving as a convenient way for the Soviet authorities to verbalise the unwanted or unpleasant for the recipient information and convince them of something that was not true, it was an effective way for Ukrainian linguists to express their own point of view, without distorting the reality, and activate the recipient’s critical thinking.

Combination of such individual communicative practices can be considered an alternative academic discourse of the totalitarian era. Its difference

from other types of discourse of the time is not being in direct confrontation with the official discourse, but being part of it. Firstly, these individual practices of resistance to the canonised theory were implemented in official texts, approved by the censorship and known to a large number of recipients. Secondly, they replicated the mechanism of the official totalitarian discourse, but with the aim of broadcasting the opposite meaning. Therefore, if the official discourse is regarded as colonial, and the alternative discourse as anti-colonial, then in the area of linguistics, the anti-colonial discourse was a part of the colonial, thus suggesting an ambivalent position occupied by the Ukrainian linguist in the Soviet times.

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