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**OSTAFIY DASHKOVYCH: HISTORIOGRAPHICAL DISCOURSE REGARDING HIS FAMILY ORIGIN ISSUE**

**Abstract.** *The purpose of the study* is to carry out a historiographical and source analysis of scientific statements about Ostafiy Dashkovych family origin and his belonging to a certain ethnic environment. **The methodology of the study** is based on the principles of historicism, systematization, scientificity, and interdisciplinarity. There have been used the following general historical methods: historiographical, historically genetic, and comparative analyses. **The scientific novelty** is based on the analysis of historical and historiographical sources that refute the notions about Ostafiy Dashkovych being of the Belarus or the Tatar descent and outline the possibilities of proving his Ukrainian origin. **The Conclusions.** Based on the analysis of historical and historiographical sources, it can be argued that for a long time there were misconceptions about Ostafiy Dashkovych origin in the scientific community. From the beginning of the XVIIth century publication of Szymon Starowolski and up to the present times in literature there has been still preserved the idea of his affiliation with Ovruch. Similarly,

since the XVIIIth century there have been prevailing the ideas about his connection with Belarus noble families. Only since the beginning of the XXth century there have been made some attempts to look into Ostafiy Dashkovych family origin based on documentary sources. However, not all new versions have taken into account some materials of the beginning of the XVIth century. The most original version was the opinion expressed by Nataliia Yakovenko about the Tatar origin of Ostafiy. Nevertheless, today all known information suggests that Ostafiy Dashkovych family has Ukrainian roots and its descent can be traced back to the XIVth century.

**Key words:** *Ostafiy Dashkovych, Grand Duchy of Lithuania, Kyiv, Kyiv region, ancestry, genealogy.*

## **ОСТАФІЙ ДАШКОВИЧ: ІСТОРИОГРАФІЧНИЙ ДИСКУРС НАВКОЛО ПИТАННЯ ЙОГО ПОХОДЖЕННЯ**

**Анотація.** *Мета дослідження* – здійснити історіографічний та джерельний аналіз наукових тверджень щодо походження роду пана Остафія Дашковича та його належності до певного етнічного середовища. **Методологія дослідження** спирається на принципи історизму, системності, науковості, міждисциплінарності. Використано такі загальноісторичні методи: історіографічний, історико-генетичний та порівняльний аналіз. **Наукова новизна:** на основі аналізу історичних та історіографічних джерел спростовуються уявлення щодо належності пана Остафія Дашковича до білоруського чи татарського роду і окреслюються можливості підтвердження думки про його українське походження. **Висновки.** На основі здійсненого аналізу історичних та історіографічних джерел можна стверджувати, що достатньо довгий час в науковому середовищі існували хибні думки про походження роду Остафія Дашковича. Від публікації Шимона Старовольського на початку XVII ст. і донині в літературі ще зберігається уявлення про його зв'язок з Овручем. Так само від XVIII ст. зберігаються й уявлення про його зв'язок з білоруськими шляхетськими родами. І лише від початку XX ст. були здійснені спроби розглянути походження роду Остафія Дашковича на основі документальних джерел. Однак всі нові версії не враховували деяких матеріалів початку XVI ст. Найбільш оригінальною стало припущення, висловлене Наталією Яковенко щодо татарського походження пана Остафія. І все ж на сьогодні вся відома інформація дає підставу стверджувати, що рід Остафія Дашковича має українське коріння і його початки можна шукати у XIV ст.

**Ключові слова:** *Остафій Дашкович, Велике князівство Литовське, Київ, Київщина, родовід, генеалогія.*

**The Problem Statement.** Ostafiy Dashkovych's activity in the first third of the XVI<sup>th</sup> century has long been in the interests of scholars from different countries, especially in the context of studying such issues as the Ukrainian Cossacks' formation, the Grand Duchy of Lithuania history and international processes in Eastern Europe. However, with their political and military sides studies having significant scientific achievements, there are much less works, which would attempt to investigate and summarize information about Ostafiy Dashkovych family, its origin, public life, etc. As a result, this situation leads to the accumulation of versions distorting the historical past and creating stable historical myths. Thus, historians still refer to those thoughts on the origin of Ostafiy Dashkovych family, which have no justification.

**The Analysis of Recent Researches and Publications.** To one or another degree, Ostafiy Dashkovych's activities are looked into in many works of historians. However, only some of them express more or less reasonable provisions about this person origin. The vast majority of modern research historians usually repeat the views of the XIX<sup>th</sup> – early XX<sup>th</sup> centuries scholars. The most significant and original in this topic was the publication of Nataliia Yakovenko (Yakovenko, 1996). Nevertheless, her conclusions were based on some misconceptions, not haven taken into account a number of sources and historical

circumstances. Partially, Valerii Lastovskyi (Lastovskyi, 2013; Lastovskyi, 2020) also analyzed this topic.

**The purpose of the article** is to find out the validity of the historians' ideas about the origin of Ostafiy Dashkovych family and to substantiate the idea of his Ukrainian roots. This question solution fully corresponds to the modern process of development of the Ukrainian historiography (Lastovskyi & Kushtan, 2021; Kalakura, 2019; Masnenko, 2020).

**The Results of the Research.** Ostafiy Dashkovych, the head of Cherkasy and Kaniv (1514 – 1535), distinguished himself by a number of military and political actions that were decisive for the Ukrainian history, in particular, his campaigns on the Moscow State's territory, the Cherkasy Castle defence (1532) from Khan Saadet Geray, his formulating the idea of creating a border protection system, etc. (Kushtan, & Lastovskyi, 2016; Lastovskyi, 1999). As he was an outstanding figure, some mythical stereotypes were formed around his personality (Lastovskyi, 2013).

Only in the XVIIth – XVIIIth centuries, the scientific circle began to look into the issue of Ostafiy Dashkovych and his family descent. In 1631, Szymon Starowolski (1588 – 1656), who then unequivocally wrote that this “Roxolanum” was born in Ovruch (Starovolsci, 1631, p. 153), made the first attempt. Then this issue was mainly paid attention to by the Polish historians, who were largely followed by representatives of other national historiographies, and only since the XIX<sup>th</sup> century the Ukrainian ones have initiated their studies.

In fact, the first Polish historians confused the issue of Ostafiy Dashkovych and his family origin. As they did not specifically study or raise the relevant documents, but followed the simplest path – tying him to the most famous families with the same surname at the time (Lastovskyi & Biletska, 2020). These were the Belarus Dashkovych and Dashkevych families. The Ukrainian historian Mykhailo Maksymovych was perhaps the first to refute such approaches in his famous “Historical Letters on Prednieprovsk Cossacks” (1863). “Nemtsevich and other Polish writers also speak of his origin, that he was from the common people, from Ovruch subjects of Prince Ostrozky; but this is hardly true. If he were a “simple slap” – he would not have “his own native village Gvozdoz”... and Bogdana Dashkovychev, the Ovruch mayor sister, would not become a wife of Borys Tyshkevych, and after him – Andrii Nemyrovych, the voivode (warlord) of Kyiv” (Maksymovich, 1876, p. 289). This was also a response to the publication of Volodymyr Antonovych, in which he wrote: “... Ostafiy Dashkovych, a fugitive tradesman from Ovruch” (Antonovich, 1863, p. LXXIII).

Later, Volodymyr Antonovych published another work, which confused the next generations of historians for a long time. He named Ostafiy Dashkovych's father a “nobleman” Dashko Ivanovych, to whom King Alexander I granted land in the Pereiaslav region “on the Trubezh and the Supoi rivers” in 1503 (Antonovich, 1885, p. 206). Many repeated the same position, for example, more than a hundred years later, the modern historian Taras Chukhlib (Hurzhii, & Chukhlib, 2011, p. 8). However, it is known that Ostafiy Dashkovych's father was not Dashko Ivanovych, but Ivan Dashkovych. Unfortunately, Volodymyr Antonovych himself did not indicate the source, he borrowed such information from. However, it can be assumed that it originates from one of the end of the XVIth – the beginning of the XVIIth centuries court cases, which concerned disputes over the right to own the same land “on the Trubezh and the Supoi rivers”. As Volodymyr Antonovych pointed out, that after Hryhorii Dublianskyi had sold the land in 1578, there developed some remarkable passions around, with many representatives of the Kyiv Voivodeship elite been involved in (Antonovich, 1882). It is clear that during the property disputes over land, the documents must indicate its origin and former owners.

Therefore, it is logical that there should have been the information about Dashko Ivanovych as the first owner. Moreover, it is possible that it had already been distorted, because, as mentioned above, Ostafiy's father was Ivan Dashkovych, but not Dashko Ivanovych.

Only at the beginning of the XX<sup>th</sup> century, researchers paid more attention to the figure of Ostafiy Dashkovych not only in terms of his military service, but also in terms of his social status. There appeared the works of Mykhailo Hrushevsky (1904 – 1909), Pavlo Klepatskyi (1912), Bohdan Buchynskyi (1913) and many other historians, who paid their attention to the other side of this figure's life. Firstly, it was facilitated by the publication of a large number of documentary sources on the history of the Grand Duchy of Lithuania, and, secondly, by the public interest in the past of the Ukrainian Cossacks, with whom historians directly linked Ostafiy's activities. However, the new publications were not without misconceptions. For example, Pavlo Klepatskyi, repeating Volodymyr Antonovych's statements, was evidently mistaken in claiming that Ostafiy Dashkovych's father was that very "nobleman, named Dashko Ivanovych" (Klepatskij, 1912, pp. 376, 544).

In many works, the figure of Ostafiy Dashkovych appeared only sporadically. Nevertheless, the new information published there laid the basis for new discussions and researches. For example, in 1900, Matvii (Maciej) Liubavskyi expressed the opinion that the founder of the whole Dashkovych family was Dashko Tubachovych, a "court marshal" of Prince Svidrigail, as Dashko belonged to Kyiv region local aristocracy (Lyubavskij, 1900, p. 155). In response, Mykola Dashkevych-Horbatskyi was critical of this opinion, but included Ostafiy Dashkovych in his family genealogical tree, tracing back to Korybut (baptized – Dmytro) Olherdovych (\*1358 – 1404\*), the Prince Lithuanian (Dashkevych-Horbatskyi, 1911).

Among all the works of the beginning of the XX<sup>th</sup> century, it is worth paying attention to the famous "History of Ukraine-Rus" by Mykhailo Hrushevskyi. Unlike many of his contemporaries, his vision in assessing the life and work of Ostafiy Dashkovych was based on the sources analysis. That is why the historian concluded that Cherkasy head belonged to one of the "most prominent Kyiv families" (Hrushevskyi, 1994, p. 35) and was a "Kyiv ziemianie (landed gentry) by origin" (Hrushevskyi, 1995, p. 91). Ironically, the researcher's opinion was almost ignored by subsequent generations of scholars. Ukrainian researcher Bohdan Buchynskyi, having analysed the source base in detail, clarified some points and expanded the boundaries of Mykhailo Hrushevskyi's thought to "the land of Kyiv, and with a great plausibility... Kyiv County" (Buchynskyi, 1913, p. 27).

In 1935, the work of Mykola Dashkevych-Horbatskyi, captain of the second rank of the Maritime Ministry of the Ukrainian People's Republic, on finding his family's ties with Ostafiy Dashkovych was continued by Volodymyr Dashkevych-Horbatskyi, cornet general, c. at. Minister of War under Hetman Pavlo Skoropadskyi (1918). Based on the materials collected by his relative, he generalized and, in a whole, created the scheme that connected Ostafiy Dashkovych to the Belarus families, moreover, the Princely ones (!). Although, Ostafiy himself did not have the title of prince. The latter was explained by the fact that his family belonged to those families "who, having lost their sovereign rights or their estates, lost both their title and passed into the general state of the ordinary nobility" (Dashkevych-Horbatskyi, 1935, p. 199). As to the works of Mykhailo Hrushevskyi and Bohdan Buchynskyi, the researcher was familiar with them, but apparently believed that they did not contradict his thought.

Much later, in 1969, the Ukrainian Diaspora historian Viacheslav Seniutovych-Berezhnyi expressed a new version of Ostafiy Dashkovych's descent. He accentuated the groundlessness of the quite common opinion found in literature that "Ostafiy either came from "commonality"

or originated from the Ostroh Princes' peasants" (Seniutovych, 1969, p. 119). However, not giving a clear justification for his opinion, the author expressed the idea of Dashkovych's origin from the "old and strong earthly family of the Bratslav region".

Finally, in the 1990s, Nataliia Yakovenko, known for her genealogical researches on the old Ukrainian nobility, decided to make some assumptions about Ostafiy Dashkovych's ancestry. In a number of her publications, she outlined the range of his family ties with other noble families and expressed some views on his descent that were radically different from the previous historians' ones. In her article about the Nemyrych family, the researcher first noted that all previous ideas about Ostafiy's origin were based on "the search of a documented person named Dashko" (Yakovenko, 1996, p. 167). Then the author offered her own "assumption about the genus's Turkic origin". She identified several main points, which, in her opinion, are confirmed by the following: 1) with the first reason for this being an "incomprehensible brevity of the Christian family synod", reflected in the commemoration book of the Golden-Domed St. Michael's Monastery; 2) "closeness to the Glinski Princes"; 3) Ostafiy Dashkovych's lands ownership ("inherited from the paternal and maternal side" on the rivers of the Rastavitsia and the Kamianka), but not those received "in the service to the Grand Duke"; 4) impeccable knowledge of the Tatar language; 5) the meaning of the word "Dashko", which was not only a diminutive form of the name "Danylo", but also a derivative of the Turkic "Dashyk", i.e., "tinhorn, strutter" (Yakovenko, 1996, pp. 167–168).

From the abovementioned, we may conclude that there were expressed several basic positions regarding Ostafiy Dashkovych originated from:

1) Ovruch (Szymon Starowski, Volodymyr Antonovych, Dmytro Yavornytskyi, Mykola Arkas, etc.),

2) Dashko Tubachovych's family in the Kyiv region (Matvii Liubavskiy),

3) a Kyiv family (Mykhailo Hrushevskiy),

4) "the land of Kyiv, and with great plausibility from Kyiv district" (Bohdan Buchynskiy),

5) a family descent from the Lithuanian Prince Korybut (baptized – Dmytro) Olherdovych (Mykola Dashkevych-Horbatskiy),

6) the Belarus Princely families (Volodyslav Dashkevych-Horbatskiy),

7) a family from the Bratslav region (Viacheslav Seniutovych-Berezhnyi),

8) the Turkic descent (Nataliia Yakovenko).

Since 1631, among the ideas expressed, the most stable has turned out to be the opinion of Szymon Starowski. Despite, Mikhailo Maksymovych levelled it in 1963, it can be still found in many modern scientific publications. Historians hardly analysed other ideas. However, the most justified seems to be the newest one by Nataliia Yakovenko. The latter deserves a special attention, because, unlike other versions, it is based on a number of errors and illogicalities. All the points made by the researcher regarding the origin of Ostafiy Dashkovych are defined above; therefore, the remarks given here will provide them with the answer:

1. The "shortness" of the family synod in the commemoration book of the Golden-Domed St. Michael's Monastery may seem so only when other records ignored. In particular, this applies to the oldest Monument of the Kyiv-Pechersk Lavra, published by Stepan Golubiev (1848 – 1920) in 1892, and the Kyiv-Podilskiy Vvedenska Church's commemoration book in the Near Caves of the Kyiv-Pechersk Lavra, published by Oleksii Kuzmuk in 2007. They contain records about the family of Ivan Dashkovych, Ostafiy's father, where we can find information about a larger number of people than in the Golden-Domed St. Michael's Monastery's commemoration book.

2. “Proximity to the Glinski Princes” seems at least strange, as it is not confirmed by any fact except that one that in 1508, during the uprising of Mykhailo Glinski, Basil III, Grand Duke of Moscow, sent troops led by Ostafiy Dashkovych to help Glinski. However, the order execution can hardly be considered as a kind of “closeness”. Instead, the real “closeness” is observed in relation to Prince Konstantyn Ostrozky, whom he constantly cooperated with and was even buried nearby.

3. Ostafiy Dashkovych not been given land “in the service to the Grand Duke” is a wrong position. Moreover, it is evidenced by the documents on the property division after his death. For example, let us take at least village of Voniachyn in the Vinnytsia County, which was not matrimonial (Russkaya istoricheskaya biblioteka, 1914, p. 54). In addition, according to Volodymyr Antonovych’s information, as mentioned above, the lands that Ostafiy Dashkovych’s father received “on the Trubezh and the Supoi rivers” were also given “for service”. Thus, it is quite possible to speak about the village of Ihnatkovtsi on the Stuhnia was given for his father’s “service”, later presented to the Kyiv-Vydubitsky Monastery (Arhiv Yugo-Zapadnoj Rossii..., 1883, p. 31).

4. The Tatar language perfect knowledge cannot serve as an argument in the question of his origin. Such knowledge might be conditioned by various factors (for example, being in captivity, constant communication with native speakers, etc.). Accordingly, other languages knowledge also cannot be the evidence of belonging to a particular ethnic group.

5. The name “Danylo” (and its derivative “Dashko”) should be considered primarily as a reception from the Hebrew, but not from the Turkic languages. Its penetration and popularity in the Ukrainian lands should primarily be associated with the use of the Bible, but not with the Turkic names. By the way, the famous Slavic philologist Boris Unbegaun (1895 – 1973), a member of the Ukrainian Free Academy of Sciences in the United States, noted that the surname Dashkovych is derived from diminutive forms (Dashkovych <Dashko <Danylo) and refers to the surnames, typical of the Ukrainian nomenclature (Unbegaun, 1989, p. 204).

It seems that for a more balanced position, many researchers lacked some documentary material, which, in fact, has already been known since the XIX<sup>th</sup> century. Therefore, it is worth focusing on some points that have not been taken into account.

Almost all researchers (with the exception of Bohdan Buchynskyy in 1913, although he did not indicate the exact source of information) missed one important characteristic of Ostafiy Dashkovych, expressed by Stanislaw Gursky, the canon of Polotsk and Krakow (1497 – 1572) in 1529: “Eustaphio Daskowicz de Kijow, Rutheno” (Acta Tomiciana, 1901, p. 233). The evidence is quite eloquent.

Moreover, if we take into account the family records in the above-mentioned commemoration books (the Kyiv-Pechersk Lavra and the Vvedenska Church in the Near Caves of the Kyiv-Pechersk Lavra), we should conclude that the Ostafiy Dashkovych family’s close kinship with all other Dashkovych and Dashkevych families is completely crossed out... In any case, these records do not give any grounds for claiming any blood ties with them. There are no similar grounds in all other documents, in particular, in those relating the land ownership.

Finally, the question that cannot be avoided: who could be the ancestor of the Ostafiy Dashkovych family? It is extremely difficult to answer it without direct instructions in the documents. This had been already proved by all the information, collected by Mykola Dashkevych-Horbatskyi, about a number of the XIV<sup>th</sup> and XV<sup>th</sup> centuries personalities named Dashko. Viacheslav Seniutovych also noted the same moment. Therefore, here it is necessary to find other bases, instead of finding a simple analogy of names.

If we analyze the life and work of Ostafiy Dashkovych, it turns out that they constantly passed by Prince Konstantyn Ostrozky (stay in Muscovy (Grand Principality of Moscow), the uprising of Mykhailo Gliniski, military campaigns and, ultimately, even burial). Perhaps, this connection is a testament to the long-standing vassal relations between the families of the Ostroh Princes and the Dashkovychs. In this case, it is worth noting the 1344 report of Jan Długosz about the revolt of Daszko, the elder of Przemyśl, and Danylo Ostrozky against King Casimir III the Great (Kazimierz Wielki) (Długosz, 2009, pp. 292–293). The latter of two became the founder of the Ostroh family and could be the same Dashko. Jan Długosz described them both as rebellious “rusinów”.

Of course, the definition of Dashko, the Przemyśl elder, as the ancestor of the Ostafiy Dashkovych family is only a version. However, it could explain a lot, for example, the family poverty. After all, that revolt defeat should have consequences, perhaps an escape from Galician Rus to Kyiv region, and subsequent oblivion. At the same time, this did not apply to Danylo Ostrozky, as he related to the Gediminids, thus, been guaranteed a certain inviolability.

Taking into consideration the above mentioned, it can be assumed that the founder of the Dashkovych family could be the Dashko (from “rusinów”), the Przemyśl elder, mentioned in 1344. Perhaps after the failed revolt against Casimir, the King of Poland, his family had to move to Kyiv, but continued to maintain ties with the Princes of Ostroh. However, the name of the family’s founder is not mentioned in the family records’ commemoration book (possibly due to the antiquity). In addition, we can confidently attribute the whole family of Ostafiy Dashkovych (“Roxolanum”, “de Kijow, Rutheno”) to the ancient Ukrainian aristocratic circle not only in Kyiv but throughout the Kyiv region.

**The Conclusions.** Thus, it can be argued that in historical science, the issue of the Ostafiy Dashkovych family origin has largely been based on misconceptions and personal interests. This did not take into account some documentary sources of the beginning of the XVIth century, which significantly complement our ideas about him and his family. This primarily applies to the information in the commemoration book. The address to these and other materials allows us to assert that the family of Ostafiy Dashkovych belongs to the Ukrainian ethnos.

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**HAMLET FARM DEVELOPMENT IN THE SOUTH OF UKRAINE  
(the end of the XVIIIth – the first third of the XXth century)**

**Abstract.** *The purpose of the research is to study the hamlet form of management in the South of Ukraine at the end of the XVIIIth – the first third of the XXth century. The Methodology of the Research.* It was possible to achieve the goal with the help of the use of postmodern methodology. The research is based on the principles of objectivity, multifactorialism, historicism, the implementation of which took place due to the use of historical genetics, problem chronological, narrative, retrospective, classification, historical biographical methods and content analysis. **The scientific novelty** is that for the first time a comprehensive study of the hamlet farm development in the South of Ukraine at the end of the XVIIIth – the first third of the XXth century has been carried out. Numerous new sources have been involved in the scientific circulation, which allows expanding the idea of the existing farm management system in the region. The criteria of the analysis have been formulated and the hamlet classification has been developed, the periodization of hamlet development has been offered. The issues of preconditions, conditions, social mechanisms, algorithms of creation and distribution of hamlets have been elucidated.

**The Conclusions.** The emergence and spread of hamlets had been an integral part of the settlement and economic development of southern Ukraine since the end 1880s. The upper chronological limit of their existence in the region coincided with the beginning of collectivization. For almost a century and a half in the rural areas of the south there were developed eight varieties of farmland: 1) one-yard hamlets of wealthy peasants that existed on privately owned, rented and allotted lands; 2) multi-yard hamlets of wealthy peasants and middle class peasants (on privately owned and rented lands); 3) multi-yard hamlets of wealthy peasants on allotted lands; 4) multi-yard hamlets of poor peasants on allotted lands; 5) one-yard privately owned hamlets of the Azov and Danube troops' officers; 6) one-yard hamlets of wealthy Cossacks on the allotted lands of troops; 7) multi-yard hamlets of wealthy and middle-class Cossacks on the allotted lands of troops; 8) multi-yard hamlets of the wealthy German-speaking colonists on allotted and privately owned lands.

There were five stages in their development in the region: the end of the XVIIIth century – 1861; in 1861 – 1906; in 1906 – 1914, in 1914 – 1921, in 1921 – 1929. During the first stage the Cossack, colonial and peasant hamlet became one of the main natural and economic forms of settlement and economic development of the region. During the inter-reform period, i. e., at the second stage, the peasantry was the main subject of the hamlets foundation. At the same time, one-yard as well as in groups and by renting and buying privately owned land, wealthy and middle-class strata spread the hamlet system of management in the region in the competition for land with the community, colonists, burghers, and merchants. There was a noticeable trend in the spread of hamlets-vyselkiv and experimental rental farms. The defining method of spreading hamlet was intra-allotment land management at the third stage. In 1906 – 1917 plot of land strips of rural communities became an arena of internal competition for land. The spread of plot of land management system became widespread at that time. Not only economically stable peasants but also indigenous peasants became owners of hamlets. During the fourth stage – during the period of World War I and the revolution – hamlet development system was regressive. Its defining features were the return of small-scale land hamlet-peasants to the communal system and the forced destruction farms of the German-speaking colonists. During the NEP years, that is at the fifth stage, there was a slight revival of the hamlet system in some southern Ukrainian territories. The destruction of hamlet system took place during collectivization.

**Key words:** hamlet, agriculture, land use, agrarian reform, peasantry.

## РОЗВИТОК ХУТІРСЬКОГО ГОСПОДАРСТВА НА ПІВДНІ УКРАЇНИ В КІНЦІ ХVІІІ – ПЕРШІЙ ТРЕТИНІ ХХ ст.

**Анотація.** Мета статті полягає у дослідженні хутірської форми господарювання на Півдні України кін. ХVІІІ – І третини ХХ ст. **Методологія дослідження.** Досягнення мети стало можливим завдяки використанню методології постмодерну. В основу дослідницького пошуку покладено принципи об'єктивності, багатofакторності, історизму, реалізація яких відбулася завдяки застосуванню історико-генетичного, проблемно-хронологічного, нарративного, ретроспективного, класифікації, історико-біографічного методів та контент-аналізу. **Наукова новизна** полягає у тому, що вперше здійснене комплексне дослідження розвитку хутірських господарств на Півдні України кін. ХVІІІ – І третини ХХ ст. До наукового обігу залучено низку нових джерел, що дало змогу розширити уявлення про час існування системи ділянкового господарювання у регіоні. Сформульовано критерії аналізу та розроблено класифікацію хуторів, запропоновано періодизацію розвитку хутірських господарств. Розкрито питання передумов, умов, соціальних механізмів, алгоритмів створення і розповсюдження хуторів. **Висновки.** Виникнення і поширення хуторів було невід'ємною складовою заселення і господарського освоєння Півдня України з кін. 1880-х рр. Верхня хронологічна межа їх існування у регіоні збіглася з початком колективізації. За майже півтора століття у сільській місцевості півдня отримали розвиток вісім різновидів ділянкових господарств: 1) однодвірні хутори заможних селян, що існували на приватновласницьких, орендованих та надільних землях; 2) багатодвірні хутори заможних селян та середняків (на приватновласницьких та орендованих землях); 3) багатодвірні хутори заможних селян на надільних землях; 4) багатодвірні хутори селянської бідноти на надільних землях; 5) однодвірні приватновласницькі хутори старшини Азовського та Дунайського військ; 6) однодвірні хутори заможних козаків на надільних землях

військ; 7) багатодвірні хутори заможної та середняцької верств козацтва на надільних землях військ; 8) багатодвірні хутори заможних німецькомовних колоністів на надільних та приватновласницьких землях.

У їх розвитку в регіоні можна виокремити п'ять етапів: кін. XVIII ст. – 1861 р.; 1861 – 1906 рр.; 1906 – 1914 рр., 1914 – 1921 рр., 1921 – 1929 рр. Протягом першого з цих етапів козацькі, колоністські та селянські хутори стали однією з головних природно-економічних форм заселення і господарського освоєння регіону. У міжреформений період, тобто на другому етапі, головним суб'єктом створення хуторів стало селянство. Одновірно і групами шляхом оренди і купівлі у приватну власність ділянок представники заможної та середняцької страт останнього поширювали в регіоні хутірську систему господарювання у конкурентній боротьбі за землю з общиною, колоністами, міщанами, купецтвом. Помітною була тенденція розповсюдження хуторів-виселків та експериментальних орендних хуторів. Визначальним способом поширення хуторів на третьому етапі стало внутрішньонадільне землепорядкування. Смуги сільських общин в 1906 – 1917 рр. перетворилися на арену внутрішньостанових конкурентних змагань за землю. Поширення ділянкової системи господарювання у той час набуло масового характеру. Власниками хуторів стали не лише економічно стійкі селяни, а й незаможні. Протягом четвертого етапу – в роки Першої світової війни та революції – розвиток хутірської системи мав регресивний характер. Визначальними рисами його стали повернення дрібноземельних селян-хуторян до общинного устрою та примусове знищення ділянкових господарств німецькомовних колоністів. В роки непу, тобто на п'ятому етапі, на території деяких південноукраїнських округів мало місце незначне відродження хутірської системи. Знищення останньої відбулося під час колективізації.

**Ключові слова:** хутір, сільське господарство, землекористування, аграрна реформа, селянство.

**The Problem Statement.** The study of historical forms of social and economic organization of the rural population is a key point for understanding the patterns of the agrarian system development in Ukraine. Hence, the topicality of studying the genesis of hamlet management system is outlined by the role of the latter in the domestic agricultural history. Much attention was not paid to the topic by the experts. Published scientific papers need to be rethought because they are fragmentary and contain ideologues. Solving the above-mentioned issue, taking into consideration the regional aspect, would have not only theoretical but also practical consequences. Experience of farming in hamlet would be useful for modern Ukrainian farmers. It would be positive to install it in the context of land market introduction.

**The Analysis of Recent Researches and Publications.** Traditionally, in the historical literature, the spread of hamlet management system is associated with the course of land management during the Stolypin reform. In classical studies of S. M. Dubrovsky, S. M. Sidyelnikova, A. Ya. Avrekha, A. M. Anfimova, O. I. Syzonenko, I. L. Sabadyryeva, P. M. Zyryanova it is emphasized that the main task of government policy direction was to destroy the community and stimulate the development of commodity-market relations in rural areas (Pryimak, 2002, pp. 4–5). At the same time, both in their content and in modern publications (Mykhailenko & Cheremisin, 2020, p. 42) the South of Ukraine was defined as the region with a relatively deeper penetration of capitalism in the agricultural sector, polyethnic and multi-religious composition of the rural population (Savchuk & Vasylchuk, 2020, p. 163). The peculiarities of origin of hamlet and vidrub (land allocated to a peasant on the rights of personal property without the transfer of the estate) on its territory in 1906 – 1917 were analyzed in historiography in great detail. Much attention should be paid to the issue of the essence of the rural community adaptation mechanisms to new conditions of land use, forms of social resistance to land management work in the colonist settlements, desire of the bourgeoisie to create local farms.

At the same time, nowadays there are no complex works in the scientific historical literature, the pages of which would elucidate the issue of hamlet system development in the South of Ukraine at the end of the XVIIIth – the first third of the XXth century. The tradition of recognizing Katerynoslav, Tavriya and Kherson hubernia (provinces) as regions of communal land use is deeply rooted in historiography and prevents scholars from expanding the chronological boundaries of research and covering the entire existence of local farms. The publication by M. A. Yakymenko is considered to be the only attempt to violate it. In the publication content, the assumption was made about the small number of hamlet economies in the steppe zone on the eve of the reform of 1906 – 1917 (Yakymenko, 1996, p. 26). In historical and local works of lore nature (Karagodin, 1998; Boiko, 2005; Malenko, 2008) there is only delineation of the issue field boundaries of research. The issue of hamlet classification, periodization of their development, preconditions, conditions, social mechanisms, algorithms of creation and distribution remains open. This gap can be bridged, because the statistics of that time, reported of the capital auditors, analytical notes of Zemstvo officials (Avgustinovich, 1882; Loginov, 1906), study of the economic system of the southern Ukrainian peasantry economic (Postnikov, 1891) sociological (Stolypin, 1892) sections, other historical sources have a high degree of information and reliability. The outlined moments prompted the authors to write this article.

**The purpose of the research** is to study the hamlet form of management in the South of Ukraine at the end of the XVIIIth – the first third of the XXth century.

**The Results of the Research.** Hamlet – a type of a rural settlement, where homestead and field work was performed alone or by a group of related or congenial by common economic human interests (Hurzhii, Shevchenko & Avramenko, 2013, p. 442). The main reason for the relatively late period of settlement and economic development of the South of Ukraine was that the first farms on its territory were founded only, for example, at the end of the XVIIIth century. The reason for their disappearance was the implementation of the course of collectivization proclaimed by the Soviet authorities in 1929. For almost a century and a half, a significant number of varieties of this form of management emerged in the region. In order to classify them, the following four basic criteria are provided: 1) by caste of the khutorianyn; 2) by the level of his socio-economic well-being; 3) by the form of ownership of the land plot; 4) by number of the households.

Due to the application of the first criterion, it was possible to single out the following three groups of hamlet – the Cossack, the peasant and the colonist. The discrepancy between them was not only in the legal status of their owners but also in the traditions of land tenure, land use, agriculture. Each family of the German-speaking colonists, for example, at the time of settlement received a plot of 60 acres. The plot was inherited on the basis of the right of the majorat. The colonists used a multi-field system of crop rotation and had the best stock, cattle (CSHAM, f. 419, d. 1, c. 1877, p. 116). The Cossacks of the Azov and Danube troops founded hamlets based on the customary law of self-occupation of land. Livestock breeding and fishing provided the power of their farms. There was always a homestead on the peasant's hamlet, but agriculture had an extensive feature mostly. The area of arable land could range from a few desiatyn to several hundreds. After the owner's death, the arable land was divided among all male heirs (CSHAM, f. 419, d. 1, c. 1877, p. 121).

According to the second criterion, the farms of hamlet dwellers can be divided into rich, middle-class and poor. The difference issue between them in terms of land, stock, livestock, etc., in our opinion, does not require thorough coverage. It is covered in detail in scientific

literature in the context of socio-economic structure of the rural population of Ukraine and can be extrapolated to the subject of this publication. Consequently, owing to the third criterion there were singled out hamlets that were based either on the principle of a private property, or rent, or allotment use. The fourth criterion came in handy during the conditional division of the southern Ukrainian hamlets on the basis of the number of households (yards) in each of them. The starting point was the understanding that during the covered period there was some identity between the concepts of family, distant family, yard. They were defined as a group of close relatives, who lived together and ran a joint household. Hence, there were one-yard hamlets (those consisting of one household) and multi-yard hamlets (those consisting of two or more households) in the region. Due to the lack of fresh drinking water the multi-yard hamlets were founded. Hence, the hamlet owners built two or four houses near the well. The surveyors took a plot of arable land around the hamlet.

Owing to the application of the above-mentioned criteria it was possible to provide the following classification of the southern Ukrainian hamlet varieties discovered during the research: 1) one-yard hamlets of wealthy peasants (existed on privately owned, as well as rented and allotted lands); 2) multi-yard hamlets of wealthy peasants and middle class peasants (on privately owned and rented lands); 3) multi-yard hamlets of wealthy peasants on allotted lands; 4) multi-yard hamlets of the indigenous peasant on allotted lands; 5) one-yard privately owned hamlets of the Azov and Danube troops' officers; 6) one-yard hamlets of the wealthy Cossacks on the allotted lands of troops; 7) multi-yard hamlets of the wealthy and middle-class Cossacks on the allotted lands of the troops; 8) multi-yard hamlets of the wealthy German-speaking colonists on allotted and privately owned lands. The levers of agricultural policy and public management mechanisms of stimulating development, socio-economic and socio-cultural factors of distribution, the quantitative ratio and economic power of these types of plot farms had been different since the end of 1780s to the end of 1920s. Hence, there were five stages in the evolution of hamlet system in the South of Ukraine.

At the first stage, from the end of the XVIIIth century and before the abolition of serfdom, the Cossacks of the Danube and Azov troops, the peasants migrants from Poltava, Chernihiv, Kyiv, Kharkiv gubernia (provinces), as well as the German-speaking colonists were the founders of hamlets in the region. Under conditions of a low population density, establishment of the above-mentioned hamlets was based on the customary law of self-occupation of land. Generally, they chose a convenient place near the source of fresh drinking water, where the first settler built residential and commercial buildings, a dam with a mill or a windmill. The Cossack received permission to establish one-yard hamlet from the village yurt (community) on condition that there were no obstacles to the others. That is, he became a user of the land on the area lands, which was owned by the Army (Malenko, 2008, p. 112). The Cossack's economy hamlet had a commodity orientation and, before the transformation of the south into a region of capitalized grain growing, specialized mainly in sheep breeding. The ancillary industries such as fishing, honey hunting, gardening, horticulture, etc., were also important. The value of the property could reach 3 thousand karbovantsi in silver. According to contemporaries, those hamlets resembled Zaporizhzhia zymivnyky of the second half of the XVIIIth century in terms of the type of management, form of housing and ancillary facilities (Malenko, 2008, p. 114).

At the same time, after obtaining permission to establish a settlement within the state land fund in the South, the peasants transferred the experience of local management from the place of previous residence – the Left Bank or Slobozhanshchyna. Recepting Tavria as an endless

place with ample opportunities to realize the dreams of free management, the latter often rejected even the idea that the land could be privately owned. The belief that “it is God’s” was the basis for the peasant in order to develop the soil until his economic interests collided with those of his neighbours. One-yard hamlets with an agricultural direction turned into settlements over time (Karagodin, 1998, p. 76). The inefficient ones, due to the desire of the local state administration to regulate and provide organized forms of settlement of state lands, were destroyed during the period of the 1830s and 1830s, and their owners were relocated to large settlements by force (CSHAM, f. 419, d. 1, c. 1877, p. 48). However, highly profitable, large in area, focused on commercial breeding of merino sheep, one-yard peasant hamlets continued to exist in the steppes of Azov and Kherson regions until the end of the 1870s, and sometimes even later (Stolypin, 1892, p. 6). The disappearance of the latter was hampered by the lack of the necessary number of sources of fresh water to promote agriculture.

There were numerous examples in the region of founding hamlets not by one owner but by several owners. There was the algorithm for their creation, which consisted of the following steps. The establishment of settlements was preceded by the creation of a social association of future owners, which acted as a group subject of the interests representation before the State department, landowners and fellow villagers concerning the problem solution as the purchase or lease of land. After that, there was a division into plots according to the size of the share contribution and, not far from each other, the necessary buildings were erected. As a result, such hamlets resembled from afar an incompact, scattered village (RSHA, f. 408, d. 1, c. 117, p. 3). Affluent Cossacks of the Azov and Danube armies, for example, resorted to this type of hamlet settlement, preferring to buy or rent land outside the military lands (Malenko, 2008, p. 114). The German-speaking colonists of Khortytsia Mennonite, Molochansky, Berdyansky, and other districts also settled there, where the state allotted 30 to 60 dozens per family of the formed yard community (Avgustinovich, 1882, pp. 32–36). At the first stage, the examples of the creation of the multi-yard hamlets by landlords and state peasants were infrequent. In the South of Ukraine, the representatives of the situation mentioned above were the compact settlements founders. It should also be emphasized that the Cossack, colonial and peasant hamlets of that time were based on the right of land allotment.

Private one-yard hamlets began to appear in the south of Ukraine around the middle of the XIXth century. Their founders were usually the officers of the Azov and Danube Cossack troops. The main reasons for that were the land purchase and sale operations, which were located outside the army borders. On the one hand, such kind of step was a profitable investment, and on the other hand, it served as a property confirmation of the privileged social status of the hamlet’s owner. Probably, the officers had a fervent desire to keep up with those representatives of the Ukrainian Cossack officers, who received noble rights and privileges under the Charter to the Gentry of 1785 and had wealthy hamlets in Poltava, Chernihiv, Kyiv. The purchase of the Novo-Petrykivka hamlet, which cost 6,000 karbovanets, made by Commanding Ataman of the Azov Army, Major General Yosyp Hladkyi could be a vivid example. Sotnyk I. Pavlychenko and military officer (starshyna) M. Tomachynsky of the Danube Army also had private estates in the territory adjacent to the town of Akkerman (Malenko, 2008, p. 114).

In 1861, the second stage of development of the hamlet management system began in the South of Ukraine. Due to the abolition of serfdom, the development of commodity market relations in the agricultural sector, the opening of mortgage institutions, permission to purchase land for subjects of non-noble origin were the reasons that the peasants became the

main participants in this process. Both multi- and one-yard hamlets were founded on allotted, privately owned, and rented lands. It should be mentioned that the owners of the hamlets belonged mainly to the wealthy and middle class.

An important place in the diversity of peasant hamlets that emerged in the south of Ukraine during the second stage, belonged to the monotheistic private owners. In 1905, large peasant estates, with a fixed right of a private ownership of their owners to the land, in the region there were 1778 with a total area of 1608504 desiatyn. A significant place among them belonged to those whose size ranged from 910 to 960 desiatyn (Statistika zemlevladieniya, 1907, pp. 12–13). The state of affairs in Berdiansk povit (county), where the area of one-yard peasant private farms exceeded arithmetically the amount of aristocratic, merchant and bourgeois land ownership should be considered as quite indicative in this context (Statisticheskiy spravochnik, 1917, p. 47).

Societies were the social and organizational basis for the multi-yard hamlets' establishment among southern Ukrainian peasants. By the 1880s, a significant number of societies rented plots of land from the state land fund located on the territory of the mainland counties of Tavriia huberniia (province). If the arable land was in use, the residential and farm buildings of the peasants were privately owned and were subject to sale to the next owner at the end of the rent. Owing to the opening of Kherson Zemsky, Peasant Land, Azov-Don and other banks, such peasant societies were able to take loans in order to buy state-owned leased multi-yards hamlets in private ownership (State Archives of the Autonomous Republic of Crimea – SAARC, f. 71, d. 1, c. 273, p. 24). In the same way, hamlet settlements were established on lands acquired through mortgages from the landlords (Pryimak, 2012, pp. 241–243). Already in 1905, in the region, in private ownership of 2077 peasant societies there were 798087 desiatyn (Statistika zemlevladieniya, 1907, pp. 12–13).

From the mid-1870s, societies, which consisted mainly of wealthy peasants, began to be the founders of multi-yard hamlets-vyselkiv. In general, the construction of the multi-yard hamlets-vyselkiv was carried out usually in remote corners of the community allotment. Even during land redistributions, such peasants remained in the “corner” of their estates, negotiating with fellow villagers on a mutually beneficial exchange of plots (Loginov, 1906, pp. 64–65). At the beginning of the XXth century such multi-yard hamlets in the region existed in Kherson, Dnipro, Yelysavetgrad, Melitopol and Berdyansk povits (counties). In the territory of the last two administrative units there were a little less than one and a half hundred. For example, there were 198 yards with 1,048 male and 1,021 female in five hamlets-vyselkiv of the village of Andriyivka, Berdyansk district. On average, one family had 37 desiatyn of arable land, 4 desiatyn of grazing land, 4 horses, 5 cows, 9 heads of small cattle (Postnikov, 1891, p. 96).

In addition, local landowners V. I. Vassal, M. O. Hant, D. A. Stolypin took part in the creation of monotheistic hamlets as a social experiment in the Northern Pryazovia. They established local farms on their own lands in order to further lease them to the rural population. At the beginning of the 1870s, the rented plots under the system of “square-hamlets” and “mariazh” were designed by the owners of two southern Ukrainian estates, in particular, the retired engineer-major V. I. Vassal near the town of Nohaisk (modern Prymorsk) and a nobleman M. O. Hant (near Melitopol). Their experience was unsuccessful due to the unwillingness to adapt the foreign experience of hamlet resettlement to local economic conditions. In addition, as tenants V. I. Vassal and M. O. Hant elected the representatives of those sections of the rural population, who did not have a direct rational motivation to achieve the goal of measures. In

the first case, the “square hamlets” were rented to local German colonists and disintegrated due to the reception of their rented land only as ancillary. In the second case, the hamlets were used by the impoverished peasants, whose level of livestock and equipment did not allow even to cultivate the land. Furthermore, Volodymyr Ivanovych Vassal, did not recognize the necessary preliminary construction of hamlet buildings and did not pay attention to the issue of mandatory maintenance of a complex system of crop rotation and agriculture by tenants (Stolypin, 1876, pp. 6–9).

The fate of rental hamlets founded by Dmytro Arkadiyevych Stolypin, an amateur sociologist, a student of A. Comte, Zemsky and public figure was different. Based on the Komte triad “observation – description – experiment” D. A. Stolypin visited several ancient state and Mennonite hamlets located near his estates in the spring of 1874. At that time, owing to a poll conducted by the Imperial Agricultural Society, he already had information about the negative experience of artificial introduction of hamlets by local landowners (CSHAM, f. 419, d. 1, c. 1877, p. 43). It is obvious that Dmytro Arkadiyevich came up with the idea of establishing plot rented farms on their lands, because he, in fact, went in search of a natural and social, not an artificial model for his experiment. It should be mentioned that he welcomed the Kalmykovy brothers’ hamlet established on rented state lands, but as a role model he rejected it immediately. The reason for the above-mentioned step was large, several hundred acres of land used for commercial sheep, which, as an industry in the region declined gradually. Instead, the analysis of Mennonite farms allowed him to identify and recognize viable principles of focus on the commodity agriculture, multi-field crop rotation system, home gardening and horticulture (Stolypin, 1876, p. 24). Hence, the above-mentioned principles along with the size of the arable land of the Mennonite family formed the basis for the founding of D. A. Stolypin rented hamlets near the estate Mordvynivka Berdyansk district of Tavriya guberniya (province). Right after his arrival, June 4, 1874, he ordered the establishment of eight hamlets, which began a social experiment. In total, during the years of 1874 – 1893, D. A. Stolypin established 22 farms, which involved 214 people (Pryimak, 2012, pp. 114–127). But the further course of the experiment was interrupted by the death of its author (Pryimak & Pryimak, 2021, pp. 96–106).

In 1893, a significant number of the peasants involved in the experiment already bought hamlets into a private ownership or were a few steps away from the purchase. In 1913, during a sample survey, those farms were assessed as wealthy and highly marketable. The experience was used by land managers in founding hamlets in the fund of the southern Ukrainian branches of the Peasant Land Bank during the agrarian reform of 1906 – 1917 (State Archives of Zaporozhe region – SAZR, f. 251, d. 1, c. 16, p. 4).

Hence, at the turn of the XIXth – XXth centuries, the south of Ukraine became a region of widely spread hamlet system. The total number of farms included in the hamlet system, according to contemporaries, coincided roughly with the number of yards, which used a progressive system of crop rotation and was equal to 43 thousand, or 30% of all yards of wealthy peasants (RSHA, f. 408, d. 1, c. 117, p. 23).

During the years of 1906 – 1917, 227877 plot farms appeared on its territory, of which 3,2% were established on the lands of the State Department, 7,3% – on the areas received by the peasants with the help of Yekaterynoslav-Tavriya and Kherson branches of the Peasant Land Bank. But the fact that 89,5% of farms in the region arose on allotted lands, determined its specificity – Yekaterynoslav, Kherson and mainland counties of Tavriya povit (province) faced the years of reform in the area with high rates of intra-community land management.

The hamlet and vidrub plots of land on their territory were created on 2154594 desiatyn, i.e., 80% of total land area of local peasantry. If other regions of the empire accounted for 3 to 9% of total land management, in the south of Ukraine this figure reached 14% (Otchetnye svedeniya, 1916, pp. 2–3).

During the years of 1906 – 1918, 204055 (89,5% of the total number) hamlets and vidrub emerged on the lands of the southern Ukrainian peasant communities. At the same time, the main direction of intra-allotment land management in the region, as well as on the Left Bank, was not the allocation, but the general deployment, which was used to create 172858 (82,2%) plot farms (Otchetnye svedeniya, 1916, pp. 16–17). But it should be highlighted that the peculiarity of intra-allotment deployment there – was that in 15% of cases of preliminary allocation to a separate piece of a communal allotment.

Furthermore, precinct farms in the southern Ukrainian provinces were established in the communities of former landowners and state peasants mainly. Due to the fact that the area of allotments of the latter was significant in the region and, in numerous cases, exceeded 10 thousand desiatyn, and village itself could stretch one street 6–12 miles, the deployment had a certain specificity. That is why, land management work in the communities of former state peasants took place in several steps. Firstly, the entire communal allotment was divided by surveyors into three sectors – adjacent to the settlement, remote from it and on the outskirts of it. Only then the internal sectoral land management began. Vidruby were created within the first and second sectors. Consequently, while dealing with the last sector – the outskirts, the land managers brought together a separate section of the plot of wealthy peasants. It was there that numerous individual hamlets arose (RSHA, f. 408, d. 1, c. 117, p. 62). That is, in the third sector of land management was aimed not only at the destruction of multi-lanes, but also distant lands, in which representatives of the higher social strata of the peasantry were interested. Although it was not uncommon in the region to transfer the estates of the latter not to privately owned plots, but to adjacent and acquired with the help of the Peasant Bank former landlords or state lands, which led to the establishment of new hamlets (RSHA, f. 408, d. 2, c. 425, p. 36).

The spread of hamlet management system in the South of Ukraine was facilitated by land management works in the communities of former state peasants. This category of rural residents accounted for about 191 thousand (84%) of the improved plots established during the Stolypin reform. At the same time, 32910 (16%) were established on the lands of the communities of former landlord peasants by deploying them (Otchetnye svedeniya, 1916, pp. 11, 13). As the vast majority of settlements of the last category of peasants did not have numerous yards, on their plots vidrybu were created mainly. The hamlet farms arose only where allotted land bordered on rented or purchased from the third parties (Zemleustroennye khozyaystva, 1915, p. 79).

It should also be mentioned that the formation of hamlets and vidruby covered some of the Bulgarian and the Jewish colonies in the south of Ukraine. In the colonies of the Mennonites and the Germans, it was identified with ethnic and socio-cultural assimilation and was blocked. Furthermore, the areas of those willing to go to the hamlet were bought by the decision of the East. Then the German-speaking community bought the disturbers of the area in the resettlement areas of Siberia or the Trans-Urals, paid for their relocation and accommodation in a new place (State Archives of Dnipropetrovsk region – SADR, f. 654, d. 1, c. 152, pp. 2–34).

The hamlet management system development during the Stolypin agrarian reform was constrained in the south of Ukraine by a number of factors. The most crucial among them

were the following: small number of land management commissions, the insufficient level of professional training of their staff, the lack of adequate land reclamation, the agronomic and financial assistance to farmers from zemstvos, the insufficient number of sources of drinking water in the steppe landscape. Due to this state of affairs, the land management commissions managed to satisfy the needs of only half of the applications received from the peasants. The same factors led to the unevenness in the ratio of types of local farms – there were a little more than 69 thousand hamlets created in the region. It was 2,3 times less than the number of vidruba (Otchetnye svedeniya, 1916, pp. 11, 13).

The cost of building hamlets was also a deterrent factor. On average, a farmer had to spend from 500 to 1,500 karbovantsi in order to move from a village or build a new estate, and a well near it, which cost 200 karbovantsi (RSHA, f. 408, d. 2, c. 425, p. 98). In general, there was not enough money, which forced the farmers to apply for a loan to the branches of the Peasant Land Bank or County Zemstvos. But the financial funds of the first were directed mainly to the development of land mortgages. The volume of construction and reclamation loans of this financial institution was insignificant in the region – the owner of a one-man hamlet received about 300–350 karbovantsi. It was only 1/5 to 1/2 of the required amount. Zemstva acted as guarantors for the peasant, for its reception and, at the same time, the controllers for its spending. But the main focus of the staff of those local governments was not on issues of lending to farmers, but on the creation of demonstration sites, educational lectures, agricultural exhibitions, etc. (Pryimak, 2002, p. 71).

At the local level, the rate of establishment of local farms had different levels of intensity. In the rural areas of the mainland counties of Tavriya guberniya (province), the influence of the above-mentioned negative factors on them was insignificant. Out of the total number of applications submitted to the land management commissions, 54,3% were satisfied by peasants, which was facilitated by the professionalism, enthusiasm, attentive and systematic attitude of the staff. Furthermore, intra-community allocation or general deployment was not conducted in the office, but exclusively in the field. In addition to the staff of land management commissions, zemstvo employees, employees of the bank, the State Department and other government agencies took part in the establishment of new types of farms. Extensive financial and agronomic assistance was provided to those willing to become hamlet owners.

Tavriya land managers also drew attention to the algorithm, which was developed by them. The previous stage in it began only after the establishment of soil quality indicators and multiple coordination of the plan with the peasants. Preparing the plan with the necessary explication was carried out after the end of autumn agricultural work: in September – October. The owners of the future plots, hence, were given some time not only to resolve interpersonal disputes finally, but also to get used to new business conditions. The above-mentioned approach contributed to the fact that there were plot farms out of the total number 9/10 established hamlets in Berdiansk, Melitopol and Dnieper povit (counties) (RSHA, f. 408, d. 2, c. 425, pp. 27–36).

The least efficient land management commissions worked in Yekaterynoslav guberniya (province). Their employees, whose professionalism was assessed negatively by both the peasants and the capital auditors, managed to perform only 50,9% of the planned work. The share of farms there was 6,6% of the total number of plot farms (RSHA, f. 408, d. 1, c. 117, pp. 19–23). Consequently, the communities resistance and the presence of a large number of landless peasants-desyatynnyky determined the specifics of hamlet establishment in Kherson region – 62,3% (Statisticheskie materialy, 1916, p. 218). The majority of them were located

on the former state and banking lands (State Archives of Herson region – SAHR, f. 6. d. 1, c. 11, p. 7).

The answer to the question concerning the economic capacity of hamlets established in the south of Ukraine during the Stolypin reform can be found in the results of a sample survey of land management farms in Berdiansk povit. The survey was conducted in 1913 and allowed us to determine that, in terms of socio-stratification, their owners were divided into the wealthy (26.1%), the middle class (22.1%) and the poor (51.8%) (*Zemleustroennye khozyaystva*, 1915, pp. 82–86).

In 1917, on average, one farm of a wealthy peasant in the region had 44 desiatyn of sowing, 3 horses, 8 head of cattle, 11 units of stock. The arable land of a hamlet was usually used for commercial cultivation of grain. In turn, the middle-class farmer had a plot of land of about 19 acres, 2–3 horses, 3–5 head of cattle, several hundred karbovantsi of net income per year. A large part of the owners of the wealthy and the middle-class hamlets ran multi-productive farms and had ancillary industries. (*Statisticheskii spravochnik*, 1917, pp. 127–129). At the same time, hamlets of the poor (with an area of, on average, 6 des.) gave the impression of the weak plants in a drastic need of care. According to the auditors, their owners looked confused, and sometimes could not explain the reasons for leaving the community (RSHA, f. 408, d. 1, c. 117, p. 89).

The chronological boundaries of the fourth stage of the studied process cover the years of World War I and the Revolution. Mobilization and death of men during hostilities, requisitioning of draft cattle, significant reduction of arable and homestead areas, and other integral components of wartime caused deteriorating living standards not only for farmers but also for the majority of the rural population of southern Ukraine. The ruin of small and, in some places, middle-class farms, the organization of auctions for the sale of their mortgaged property, the curtailment of loan programs led to growing discontent in the countryside (SAARC, f. 71, d. 1, c. 2351, pp. 126–129). In June of 1917, the Provisional Government suspended the activities of land management commissions due to the above-mentioned reasons. At that time there was a revival of the rural community along with a significant reduction in the number of hamlets.

The scale of the regress in the region was facilitated by the German colonists farms destruction, which began on February 2, 1915, in accordance with the Law “On the Elimination of Land Ownership of Citizens and Immigrants from States at War with Russia” (SAZR, f. 59, d. 1, c. 16, p. 62). In accordance with the main provisions of the Law, during the years of 1915 – 1916 the southern Ukrainian branches of the Peasant Land Bank purchased 126,246 des. It was 35,5% of the banking fund in the region during the war. At the same time, there was the non-cash payment with the colonists. The former owners of hamlets received 6% of securities (SAARC, f. 71, d. 2, c. 111, p. 128). There was no time for the sale of real estate due to the immediate forced eviction of former colonists outside the country (RSHA, f. 1284, d. 190, c. 317, p. 64). Under such circumstances, the acquisition of new lands by the Peasants Bank was more like a confiscation than an act of purchase and sale. The largest volumes of liquidation of German land tenure were in Berdiansk, Melitopol and Kherson povit (counties). They accounted for 75% of all lands acquired by the southern Ukrainian branches of the Peasant Bank during the years of 1915 – 1916. The average size of the land purchased at that time was 65 des. (SAARC, f. 71, d. 2, c. 187, p. 12). It coincided with the area of the colonist allotment at the end of the XIXth – the beginning of the XXth century.

The last – the fifth stage of the hamlet management system development was during the period of the NEP. On the one hand, the process was tolerated by the Soviet authorities, and on

the other hand, the southern Ukrainian peasantry was aware of the shortcomings of the outdated communal system. Small and cross-plots, redistributions and distant lands again became the reasons for the resumption of land management work. But the share of allocation to hamlet in a total volume of the latter was insignificant. In 1923 it was only 0,7%, and in 1927 – 1,8% (Central State Archive of the highest authorities and administration of Ukraine – CSAHAA of Ukraine, f. 2, d. 7, c. 33, p. 29). Probably, based on the experience of previous years, the rural population of the region took such step more prudently and cautious. In order to run a self-sufficient or small-scale farm, a peasant had to have not only 12–16 des. land, but also livestock, equipment, funds for the construction of buildings, wells, etc. The issue of transporting children to school, purchasing everyday goods, and maintaining family and social ties was also topical. Hence, during the years of a new economic policy implementation for the transition to peasant life in the south dared mostly wealthy peasants. The share of the latter, for example, among the peasants of Mariupol district in 1925 was 85% in 1925. Instead, the lack of land for peasants made it irrelevant to go to hamlets in Kryvyi Rih district (CSAHAA of Ukraine, f. 27, d. 10, c. 598, p. 174). Therefore, if in the first half of the 1920s there was a tendency of the working peasantry to be evicted to hamlets and vidruba, then in the second half there became noticeable its decline. In 1929, hamlets occupied only 1,4% of the total area of peasant land use (CSAHAA of Ukraine, f. 27, d. 10, c. 598, p. 18). Finally, in November of the same year, the Plenum of the Central Committee of the CPSU (b) approved the line of the Central Committee of the CPSU (b) U to eliminate hamlet and vidruba forms of management.

**The Conclusions.** The development of hamlets in the south of Ukraine occurred since the end of the 1780s to the end of the 1920s. Hamlets became widespread in both privately owned and leased and allotted lands. On the eve of World War I, hamlets along with landed estates and communities, became the main form of management in rural areas of the region. The local specificity was that they were owned not only by wealthy peasants, but also by representatives of other segments and classes of the rural population.

There were five stages in hamlet management development in the South of Ukraine. The first stage lasted from the end of the XVIIIth century until the year of 1861. Hamlets became one of the main natural and economic forms and methods of economic development of the region. Their founders were the Cossacks of the Danube and Azov armies, the German-speaking colonists and peasant settlers. In economic terms, hamlets established at that time had a high level of power and often became outposts for future large settlements. During the second stage – 1861 – 1906 – the peasantry became the main founder of both single and multi-yard hamlets. The wealthy and middle-class members of this social group usually united in societies in order to establish a hamlet settlement on state-owned leased or mortgaged lands. At that time, the tendency to establish hamlets on the lands of communities of former state peasants was also conspicuous. In addition, in the last third of the XIXth century mainland povita of Tavriya huberniya (province) became a field for social experiments of local landowners. The latter created rental farms in order to increase the profitability of their own property and prove the need to change the course of agricultural policy from community support to betting on a single peasant. It should be mentioned that at the turn of the XIXth – XXth centuries the hamlet system covered about 43 thousand farms in the territory of the South of Ukraine.

The mass spread of precinct management during the Stolypin agrarian reform led to the separation of the third stage of the studied process. In the south, at that time there were about 69 thousand farms, among the owners of which were the representatives of all social strata of

the local peasantry. Only a small part of hamlet farms in the region arose on lands acquired by the peasants from the treasuries or landowners. The main way of their foundation in the years of reform was intra-allotment land management, the dominant variety of which was the general development of communal land.

The chronological boundaries of the fourth stage covered the years of World War I and the Revolution. Its main feature was the ruin and return to a communal life of a large number of peasants. In addition, for political reasons, hamlets farms of the German-speaking colonists suffered devastating destruction in the region. Despite some progress during the fifth stage – during the years of the NEP – the development of land management in the South of Ukraine did not reach the pre-war levels. The verdict was announced in 1929 by proclaiming a course of collectivization.

The publication is a part of a comprehensive study of the economic system in the southern Ukrainian village of the end of the XVIIIth – the Ist third of the XXth century. The prospects for further research are in the field of analysis of the evolution of land tenure and land use, agricultural culture, the relationship of hamlet and other historical forms of social self-organization of the rural population. No less interesting could be the study of the peculiarities of the worldview of hamlet peasants and vidrubiv, as well as differences in the social consciousness of them and the peasants-communists.

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**PECULIARITIES OF ZEMSTVOS INTRODUCTION IN VOLYN PROVINCE  
(the second half of the XIXth – the beginning of the XXth century)**

**Abstract.** *The reform of local self-government, administrative and territorial organization on the basis of decentralization, which is taking place in Ukraine, highlights the problem of studying and analyzing historical traditions and forms of local self-government in Ukraine, in general, and its regions, in particular. The purpose of the study is to analyze the historical conditions and features of zemstvos institute introduction in Volyn province. The research methodology is based on a set of general scientific and special research methods, in which the chief focus is paid to institutional, structural and functional, problem and chronological methods and approaches. The Conclusions. In 1864 the introduction of zemstvos in the central and southern provinces is an organic part of the “great reforms” of the second half of the XIXth century that took place in the Russian Empire. The specifics of zemstvos as socio-political institutions have been elucidated. In Volyn province, the law on zemstvos of 1903 came into force on July 1, 1904. In the article there has been elucidated a fundamental difference between zemstvos of 1903 and 1911, which consisted in the evolution of zemstvos institution from state institutions to their reorganization, as local governments. The organizational structure of zemstvos, the*

order of their formation, etc., have been highlighted. There has been done the analysis of “Regulations on Provincial and County Zemstvo Institutions of January 1, 1864”, “Regulations on Management of Zemstvos in the Provinces of Vilna, Vitebsk, Volyn, Grodno, Kyiv, Kovenska, Minsk, Mogilev and Podolsk” of April 2, 1903, reports at the first annual meeting of Volyn Provincial Committee for Zemstvo Affairs in 1904, “On Determining the Order of Subordination Actions of Institutions and People to the Department of Land Management”, etc. In general, the path of zemstvos institutional development was significantly delayed in Volyn. During their formation, a considerable attention was paid to limiting the Polish influence in favour of the Russian one.

**Key words:** Volyn province, Right-Bank Ukraine, Russian Empire, zemstvos, local self-government.

## ОСОБЛИВОСТІ ЗАПРОВАДЖЕННЯ ЗЕМСТВ У ВОЛИНСЬКІЙ ГУБЕРНІЇ (друга половина XIX – початок XX ст.)

**Анотація.** Реформа місцевого самоврядування і адміністративно-територіального устрою на засадах децентралізації, що відбувається в Україні, актуалізує проблему вивчення й аналізу історичних традицій та форм організації місцевого самоврядування на теренах України загалом та її регіонах, зокрема. **Метою дослідження** є аналіз історичних умов та особливостей запровадження інституту земств у Волинській губернії. **Методологія** дослідження базується на сукупності загальнонаукових і спеціальних методів дослідження, де головну увагу приділено інституційному, структурно-функціональному й проблемно-хронологічному методам і підходам.

**Висновки.** Запровадження земств у центральних та південних губерніях у 1864 р. є органічною складовою частиною “великих реформ” другої половини XIX ст., що відбувалися у Російській імперії. Розкрито специфіку земств як суспільно-політичних інститутів. У Волинській губернії закон про земства зразка 1903 р. вступив у силу 1 липня 1904 р. Показана принципова відмінність земств зразка 1903 та 1911 рр., яка полягала в еволюції їх інституту від державних установ до реорганізації як органів місцевого самоврядування. Розкрито організаційну структуру земств, порядок їх формування тощо. Зроблено аналіз “Положення про губернські та повітові земські установи від 1 січня 1864 року”, “Положення про управління земським господарством в губерніях Віленській, Вітебській, Волинській, Гродненській, Київській, Ковельській, Мінській, Могилевській і Подільській” від 2 квітня 1903 р., доповіді на перших річних зборах Волинського губернського комітету у справах земського господарства 1904 р. “Про визначення порядку дій підпорядкованих управлінню по справах земського господарства установ і осіб” та ін. Загалом, шлях інституційної розбудови земств на Волині відбувався зі значним запізненням. Під час їх формування значну увагу приділено обмеженню польського впливу на користь російського.

**Ключові слова:** Волинська губернія, Правобережна Україна, Російська імперія, земства, місцеве самоврядування.

**The Problem Statement.** The activity of higher and central bodies of state power, the apparatus of territorial administration of the South-Western region is conditioned by a set of circumstances related to the division of the Polish-Lithuanian Commonwealth and the process of integration of Right-Bank Ukrainian lands into the Russian Empire (Bortnikov & Bortnikova, 2021, p. 49). At that time, “economic processes and geopolitical changes enabled important individual and daily changes in the society” (Udod, 2021, p. 208).

This period in the history of Volyn is marked by the existence of insurmountable contradictions between the government and large social groups of the class society on the one hand, and among social classes – on the other hand. We mean, first of all, the Polish nobility, which dominated in the socio-economic, cultural and spiritual spheres, and the Ukrainian peasantry – the bulk of the population of the province, deprived of basic civil rights (Bortnikov, 2015, p. 5). In general, the post-reform period against the background of a rapid development of productive forces “was a period of a significant revival of various social groups self-organization” (Shandra, 2021, p. 75).

In 1864, in the central provinces of the Russian Empire, the introduction of zemstvos as an institution of a local self-government became an important safeguard in the direction of limiting the tsarist autocracy, development of a public initiative and creativity, revival of economic and cultural activities at local places. On January 1, 1864, the emperor approved the corresponded Regulations (PSZ-2. №40457) та ін.

Zemstvos were established to manage economic and socio-cultural affairs; they were responsible for the construction and management of local roads, schools, hospitals, charities, providing the population with food, organization of land lending and insurance, promotion of agronomic knowledge, improvement in the handicrafts sphere, organization of land statistics, promotion of trade, industry, etc. At the same time, this institute helped to optimize the distribution of power between the center and the local authorities. According to V. Shandra, “these were those spheres of social needs which the bureaucratic state could not cope with” (Shandra, 2020, p. 52).

However, in Volyn province, as in Right-Bank Ukraine in general, zemstvos, as local self-government bodies, were introduced much later.

**The Analysis of Recent Publications.** The subject of modern foreign and domestic scholars' attention is the organization issue of local self-government and zemstvos in Volyn province in the context of the realities and traditions of the Ukrainian state formation of the second half of the XIXth – the beginning of the XXth centuries. In particular: A. Berezhna, D. Beauvoir, A. Bortnikov, O. Budnytsky, M. Volkhonsky, A. Hetmanskyy, B. Hud, M. Dolbylov, A. Karelina, V. Korobeynikov, O. Pryshchepa, O. Reyent, S. Reznichenko, V. Shandra, T. Sharovara, T. Shcherba and the others.

According to domestic scholars, for many centuries the Ukrainian people deprived of their own statehood were forced to stick to their traditions, customs, folklore to survive in the imperial environment. In fact, Ukraine has never had the right conditions to develop its own traditions. Accordingly, in order not to become a source of foreign cultures, we need to study our own democratic traditions of state-building thoroughly (Bortnikova, 2018, c. 56).

**The purpose of the research** is to analyze the historical conditions and features of zemstvos institution introduction in Volyn province, their evolution from state to elected institutions with broad powers to resolve local issues.

**The Results of the Research.** The system of zemstvo local public administration bodies was not perfect, as zemstvos functioned only at the level of provinces and counties: they did not have a lower zemstvo unit at the level of volosts, as well as a central national representation. According to the right remarks of contemporaries, zemstvos were “a building without a foundation and roof” (Korobejnikov, 2000, p. 117). This structure of zemstvos was not accidental, because otherwise, they would be a powerful political force, and it did not correspond to the interests of autocratic power. At the end of the 1870s, owing to the efforts of zemstvo liberal movement activists, it was possible to unite the efforts of some zemstvos. Five provincial zemstvo assemblies – Chernihiv, Kharkiv, Tver, Poltava and Samara – called for convening of Zemstvo Congress, which took place in Moscow, in April of 1879. In the autumn of 1904, the authorities allowed zemstvos to hold all-Russian meetings. On September 8, a meeting of the Bureau of National Congresses took place, at which it was decided to convene a Congress of zemstvo activists in Moscow on November 6, 7 and outlined a programme. However, the Congress was not authorized by the authorities and was held in private with the permission of the Minister of the Interior (Volhonskij, 2002, p. 3). Only with the beginning of World War I there was created all-Russian organization – the All-Russian Zemstvo Union.

In the second half of the XIXth – at the beginning of the XXth centuries there was a wide-ranging debate in government circles about the expediency of implementing zemstvo reform in the annexed territories, as the intensified anti-Polish policy after the uprising of 1863 gradually drove the Poles out of the financial and administrative centers of the South-Western region (Melnychuk, 2021, p. 35). In contrast to the central provinces, the introduction of zemstvos in Right-Bank Ukraine lasted for half a century in general. During the enactment of the Provincial and County Zemstvo Regulations of 1864, the government refused to introduce them in nine western provinces for purely political reasons. Zemstvos in Arkhanhelsk, Astrakhan and Bessarabian regions also demanded a special procedure for the application and implementation (PSZ-2. №40459).

The needs for socio-economic and cultural development of the country, growing political tensions, required the central government to improve the entire structure of a local public administration, and therefore the period of the 90s of the XIXth century became the time of heated discussions about the future of zemstvos. Opponents of its introduction were such influential tsarist government officials as the Minister of Finance S. Witte (1892 – 1903), who argued that, firstly, “self-government does not correspond to the autocratic system of the state” and secondly, “zemstvo cannot be considered a model institution for the local economy” and can be replaced by special government bodies easily (Karelin, 2006, p. 191). The latter was also against the introduction of zemstvos in the western provinces. On the contrary, the supporters of the expansion of zemstvos public administration on the territory of Right-Bank of Ukraine were the Minister of Internal Affairs I. L. Horemykin (1895 – 1899), Kyiv Governor L. P. Tomar (1885 – 1898), Volyn Governor S. P. Sukhodolsky (1892 – 1896), and the others. The young Russian Emperor Nicholas II (1894 – 1917) was also positive about the introduction of zemstvos in the western provinces. The point of view of those statesmen who considered it expedient and necessary to extend zemstvo practice to the western lands of the empire won, albeit with certain restrictions.

The compromise resulted in a draft regulation elaborated by the new Minister of the Interior, D. S. Sypyahin (1900 – 1902), who shared S. Witte’s view that the introduction of electoral-based provincial institutions on the western outskirts was premature. Instead of zemstvo assemblies and administrations, it proposed provincial and county committees, as well as provincial and county councils for zemstvo affairs consisting of the nobility and councilors from among the local residents of the taxable state, appointed by the administration. The provincial committee included the governor (chairman), provincial and county leaders of the nobility, whose positions in the province were replaced by government appointments, representatives of the main departmental administrative structures, essential members of the provincial presence, members of the provincial council and the mayor, as well as zemstvos (two from the county), appointed by the Minister of the Interior on the recommendation proposal of the governor. County committees consisting of the nobility (chairman) leaders, administrators, all zemstvo chiefs and tax inspectors, representatives of departmental institutions, mayors, zemstvo county leaders and parish elders, who were appointed by the governor, met only for a preliminary discussion of the most important matters of zemstvo affairs.

Executive power relied on the provincial and county zemstvo councils. The first ones consisted of a chairman and three members – all appointed by the Minister of the Interior, the second ones – of the county leader of the nobility (chairman), a clerk, a tax inspector, two zemstvo leaders and indispensable members of the board, appointed by the governor. That is, zemstvo institutions in this case were under the close care of the local administration.

County committees were deprived of the possibility of the least influence on the activities of the provincial committee and control over the expenditure of zemstvo taxes collected in the counties.

The draft was adopted by the majority of votes after discussion at the meeting of the State Council. Under the new Minister of the Interior, V. K. Pleve (1902 – 1904), the draft came into force. On April 2, 1903, Nicholas II approved the “Regulations on the Management of Zemstvo in the Provinces of Vilno, Vitebsk, Volyn, Grodno, Kyiv, Kovenska, Minsk, Mogilev and Podolsk”. However, in the draft it was not specified the exact date of its entry into force, but there was only a special permit (PSZ-3. №22757). In Volyn province, the law on zemstvos of 1903 model came into force on July 1, 1904.

With the establishment of new zemstvos, local orders of public care were abolished, as well as the positions of clerks and their assistants in the provincial administrative committees. The department of zemstvo management included: 1) management of local zemstvo duties in cash and natural duties; 2) management of capital and other property; 3) taking care of providing enough food to the local population and providing them with food aid; 4) maintenance of roads and other road constructions and piers on rivers in a proper condition; 5) arrangement and maintenance of zemstvo post office, assistance in the development of telegraph and telephone connections; 6) management of mutual provincial insurance; 7) arrangement and maintenance of the medical unit, care for a proper sanitation and prevention of epidemics. Managing God-pleasing institutions and caring for the poor; 8) arrangement and maintenance of the veterinary part in the counties, protection of animals from infectious diseases, etc. ; 9) care for fire prevention; 10) organization and development of primary and vocational education; 11) promoting the development of agriculture, trade and industry, environmental protection, etc. (Bortnikov, 2015, pp. 242–243).

In 1904, the introduction of zemstvos in Volyn province was not fully legal and organizational in the beginning. However, it cannot be said that there were no documents regulating the work of zemstvos. Thus, in 1904 the report #3 at the first annual meeting of the Volyn Provincial Committee for Zemstvo Affairs is devoted to this issue: “On Determining the Procedure for Actions of Institutions and Persons Subordinated to the Department of Land Management” (State Archives of Zhytomyr Region (SAZhR), f. 183, d. 1, c. 11, pp. 92–96). This report also contained a document regulating the activities of institutions subordinate to the Department of Land Management of the province – “Temporary Instruction on the Procedure of Institutions and People Subordinate to the Department of Land Management of Volyn Province” In particular, the instructions defined the responsibilities of the provincial administration and county administrations, as well as their procedure.

Under conditions of a revolutionary upsurge, during the first bourgeois-democratic revolution in Russia, the existence of zemstvos of this type in the western provinces no longer corresponded to the new socio-political realities understood by the majority of far-sighted politicians. Therefore, in 1906, under the leadership of P. A. Stolypin, a new draft law was developed for the nine western provinces, which, under conditions of proportional representation, guaranteed the Russians at least half of the zemstvo positions. This draft also takes into account the main shortcomings of the Regulations of 1903 in terms of improving the financial situation of zemstvos and cities: it was proposed to abolish the law on the limits of zemstvo taxation, to transfer to zemstvos and cities the right to collect real estate tax, as well as part of the income tax, etc. All this was to strengthen the material base of local governments. However, during the discussion of the draft in the State Duma, discussions and

debates on the expediency and democracy of some of its provisions, as well as the election procedures in zemstvos lasted for almost five years. At the same time, in addition to the draft of P. A. Stolypin, there were the others.

Finally, on March 14, 1911, in the form of zemstvo supreme decree, already on a new more democratic legal basis, as bodies of public self-government, it was introduced in six western provinces: Vitebsk, Volyn, Kyiv, Minsk, Mogilev and Podolsk (*Svod zakonov Rossijskoj imperii*, 1915, pp. 3–11).

The decision to introduce elected zemstvos in the annexed territories was caused, first of all, by the need to change the procedure of electing members of the State Council (upper house of the State Duma). Traditionally, large landowners were elected from the western provinces – the Poles, and that could not satisfy the ruling circles. It was assumed that giving the majority of seats in zemstvos to the Orthodox population would ensure the election of the required number of members of the State Council from among the representatives of the Russian nobility.

According to the election legislation, instead of the estates of the curia, as in other zemstvo provinces, national curias were introduced there. For the election of zemstvo leaders in Volyn, Kyiv and Podilsk provinces, county election meetings and congresses were divided into two departments: “Russian” and “Polish”. The norms of the number of leaders elected by each branch were established in such way as to guarantee the superiority of the representatives of the Orthodox population in the administrative bodies of the zemstvo self-government – county and provincial assemblies. Thus, in three Right-Bank provinces, only 13.9% of county departments were elected from “Polish” departments, while 86.1% were elected from “Russian” departments and rural communities, and 15% and 85% from provincial branches, respectively (Reznychenko, 1999, pp. 143–144). The superiority of the Orthodox population representatives was guaranteed by the law requirement in the election of executive bodies – zemstvos – to provide an absolute majority of seats to people from the first (“Russian”) department and rural communities.

In order to avoid misunderstandings in Right-Bank Ukraine, where a significant part of the population were also the Jews, the Senate Decree of March 14, 1911 included Art. 87, which deprived them of voting rights.

On September 11, 1911, on the day of P. Stolypin’s death, Kyiv Governor A. Hirs had a conversation with the latter about the introduction of zemstvos in the South-Western region. From the conversation it becomes clear how much P. A. Stolypin was aware of the situation and was in favour of zemstvos speedy introduction in Right-Bank Ukraine (Girs, 1991, p. 92).

On August 7 and 8, 1911, the first extraordinary session of Volyn Provincial Zemstvo Assembly was held, devoted to the formation of public administration bodies of Volyn Zemstvo. The minutes of the session give a complete picture of this historical event in the life of the population of Volyn province. The meeting was chaired by P. A. Demidov, a provincial leader of the nobility, a provincial zemstvo speaker of Kremenets district. The members of the meeting were county leaders of the nobility, heads of county zemstvos, provincial officials and representatives of various departments. The honorary right to open the meeting was entrusted to Volyn governor, Count O. P. Kutaisov (1909 – 1912). The executive body of zemstvo was the provincial administration in the number of four people: the chairman and three members. By voting the chairman of the provincial council was established a salary of four thousand rubles per year, members – three thousand rubles. V. E. Dvertsytzky was elected the chairman of the provincial council (*Protokoly zasedanij Volynskogo gubernskogo sobraniya*, 1911, p. 30).

The election was held by closed ballot in black and white. The same way there were held of three board members. Subsequently, there were elected the Deputy Chairman of the Provincial Council, a member of the Provincial in Zemstvo and city affairs of the presence, two members of the Provincial Commission for Land Management, two members of the Provincial School Council, a member of the Agronomic Council and a candidate for it, four members to the Council for Local Economy, two members of the Peasant Bank. The commissions of the provincial zemstvo assembly were also elected: audit commission (12 people), road (7), medical (5), school (5), agricultural (6), insurance (5) and general (4).

The activity of Volyn zemstvo is clearly divided into two periods: from July of 1904 to August of 1911 and from August 1911 until their liquidation in 1919. On December 8, 1904, Volyn Provincial Presence in Peasant Affairs received a governor's circular dated No 948, addressed to Volyn Provincial Administration and all county administrations for land affairs, city administrations and elders, police departments, peace mediators and the township board of Volyn province. Its content is of fundamental importance to understanding the role of zemstvos in the social life of the province. In addition to the exact date of the implementation beginning of the above-mentioned provision on zemstvos in Volyn, the level of the powers becomes clear, for example, in such a vital issue as pricing. The document emphasized the following: "In the province, with the introduction on July 1 of this year (1904) .... of the law of April 2, 1903 on the management of the zemstvo, the county councils for land affairs are obliged to determine the prices of bread, fodder, etc., in the county every month, from September to May" (State Archives of Volyn Region, f. 3, d. 1, c. 100, pp. 400–400v.).

According to N. Polonska-Vasylenko, on Right-Bank Ukraine, "zemstvos spread only in 1911, because the government was afraid to allow the Polish nobility to influence the self-government of this region" (Polonska-Vasylenko, 2002, p. 315). Some contemporary Ukrainian and Russian authors claim that in the South-Western region "resolving the issue of the formation of zemstvos in Right-Bank Ukraine began with the legislative act of 1904, and its actual implementation in practice took place in 1911" (Sharavara, 2005, p. 4), the others emphasize that "there were no zemstvos here until 1911" (Berezhnaya, Budnickiy & Dolbilov, 2007, p. 295).

It is obvious that the zemstvo as a state institution (not an institution of local self-government!) was introduced in Volyn province in 1904, not in 1911. An explanation of this issue can be found in the report No 53 "On the Rights of the Provincial Committee for Zemstvo Affairs to Appeal the Orders of Central Administrations" at a session of Volyn Provincial Administration in 1909. The report stated that Minsk Provincial Committee for Zemstvo Affairs authorized its provincial administration to appeal to the Senate against the Minister of the Interior's order to abolish the provincial committee on the payment of money for the lower ranks during the mobilization. The Senate, appealing to the decree of August 8, 1908 No 9267, rejected this complaint, "due to the fact that the Provincial Committees for Land Management in the provinces of Vitebsk, Volyn, Kyiv, Minsk, Mogilev and Podolsk consist of officials of various departments and zemstvos appointed by the Minister of the Interior, who *are equated with officials, and therefore are government agencies* (italics. – the authors), which operate only in accordance with a special Regulation, and secondly because the Provincial Committees for Land Management are not granted by law the right to appeal against orders of central administrations" (Doklady Volynskoj gubernskoj upravy, 1909, p. 69). Thus, the document leaves no doubt about the nature of the zemstvos of 1903, as public authorities, and therefore we have no reason to deny the existence of the institution of zemstvos in Volyn during the period of 1904 – 1911.

The fundamental difference between zemstvos of the model of 1911 was the method of forming their composition, which was based on democratic principles, as the administrative and executive bodies of zemstvos were elected by the local community. That is why, zemstvos of 1911 were called “elected zemstvos”. Thus, in his speech, at the opening of the second extraordinary session of Volyn Provincial Zemstvo Assembly, its chairman P. A. Demydov emphasized: “Gentlemen, *the elected zemstvo in Volyn* – a new matter – a difficult matter – a difficult matter” (Zhurnal Volynskogo gubernskogo zemskogo sobraniya, 2012, pp. 2–3).

**The Conclusions.** Thus, the zemstvo reform of the second half of the 1860s took place on the western outskirts of the Russian Empire with a delay of several decades, and the introduction of elected zemstvos – half a century. During their formation, a considerable focus was on limiting the Polish influence in favour of Russia. From the time of the First Russian Revolution of 1905 – 1907, the same norms and rules were already in force in Volyn province as in the central regions of the empire. Despite the shortcomings and limitations due to the nature of the tsarist autocracy, zemstvos were an effective means of organizing many spheres of local communities life, and the experience of their work enriched the world palette of public administration at local places. Perspective is studying zemstvos positive experience in solving a wide range of problems of local communities on the basis of subsidiarity, their distancing from the central government and the specifics of tax policy.

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**MOTIVES OF THE MARRIAGE OF THE UKRAINIANS  
IN THE GALICIAN VILLAGE IN THE FIRST HALF OF THE XXth CENTURY  
(based on archival materials of the Lviv Greek Catholic Metropolitan Consistory)**

**Abstract.** *The purpose of the research is to bring out the paramount motives and principles of the Galician Ukrainians' married couple choice in the first half of the XXth century, their change/stability as compared to the previous historical period – the XIXth century. The methodology of the research is based on application of the methodological principle of historicism, as well as general scientific and special scientific methods, primarily comparative historical. The meticulous study of the archival primary sources and verification of the information available in them through comparison with the ethnographic materials have been given priority. The scientific novelty of the study is that for the first time in the Ukrainian historical science, based on the archival materials, the Galician Ukrainians' marriage motives in the first half of the XXth century have been analyzed, which can serve as a basis*

for further more thorough studies in marital and family relations. The factual material and theoretical generalizations presented in the article will be vital for understanding the socio-economic and socio-political realities inherent in Galician rural society of that period. **The Conclusions.** When it came to choosing a future couple, the Galician Ukrainian peasants were guided by different motives, stuck to certain principles and rules, most of which were characteristic of the previous (XIXth) century. Those were, in particular, pragmatic property interests – the desire to increase their own wealth, unite neighboring lands, prevent the division of property, and etc. Social stability and a positive reputation for the future family were of utmost importance to the peasants. By the way, the positive reputation of the future family depended not only on the availability of movable and immovable property, land and livestock, but also on the legitimacy of marriage in the eyes of the community and the church. That is why, in archival materials a significant part of cases concerned the legalization of marriages “by faith”, especially between widows. The Galician rural population also kept to the principle of social, territorial and religious endogamy, while violating the ban on marriage between close relatives. The first half of the XXth century was also characterized by the political motive of marriage and the motive of economic survival under conditions of war and emigration. Archival materials also prove convincingly that the social status and economic stability of the rural community were appreciated more than love or amicable relations in the family. Hence, early marriages, economic sanctions and coercion of parents to marry, physical violence of a man against a young woman, etc., were commonplace.

**Key words:** Galicia, the Ukrainians, rural population, marital and family relations, marriage, family.

### МОТИВИ ОДРУЖЕННЯ УКРАЇНЦІВ ГАЛИЦЬКОГО СЕЛА У ПЕРШІЙ ПОЛОВИНІ ХХ ст. (за архівними матеріалами Львівської Греко-католицької митрополічної консисторії)

**Анотація. Мета дослідження** – з'ясувати основні мотиви і принципи вибору українцями Галичини подружньої пари в першій половині ХХ ст., їх зміну / сталість порівняно з попереднім історичним періодом – ХІХ ст. **Методологія дослідження** базується на застосуванні методологічного принципу історизму, а також на загальнонаукових і спеціальних наукових методах, передусім на порівняльно-історичному. Першочергове значення надане скрупульозному вивченню архівних джерел та верифікації наявної у них інформації завдяки зіставленню з етнографічними матеріалами. **Наукова новизна** дослідження полягає в тому, що, залучивши архівні матеріали, вперше в українській історичній науці проаналізовано мотиви одруження українців Галичини в першій половині ХХ ст. Водночас його результати можуть послугувати основою наступних ґрунтовних студій у сфері шлюбно-сімейних відносин. Наведені в статті фактографічний матеріал і теоретичні узагальнення матимуть важливе значення для розуміння соціально-економічних та суспільно-політичних реалій, властивих тогочасному галицькому сільському суспільству. **Висновки.** Під час вибору майбутньої пари українські селяни Галичини керувалися різними мотивами, дотримувалися певних принципів і правил, більшість із яких була характерна і для попереднього (ХІХ) століття. Це, зокрема, прагматичні майнові інтереси – бажання примножити власне багатство, об'єднати сусідні ґрунти, не допустити розділу майна тощо. Важливе значення мали для селян соціальна стабільність та позитивна репутація майбутньої сім'ї. Остання, до слова, залежала не лише від наявності рухомого і нерухомого майна, землі і худоби, а й від легітимності шлюбу в очах громади і церкви. Саме тому в архівних джерелах значна частина справ стосується узаконення шлюбів “на віру”, передовсім між вдовцями. Сільське населення Галичини дотримувалося і принципу соціальної, територіальної та релігійної ендогамії, порушуючи водночас заборону на шлюб між близькими родичами. Для першої половини ХХ ст. характерними були також політичний мотив одруження і мотив економічного виживання в умовах війни й еміграції. Матеріали архівних справ доводять також, що соціальний статус та економічну стабільність сільська громада цінувала більше, ніж кохання чи дружні стосунки в родині. Тому звичним явищем були ранні шлюби, економічні санкції та примус батьків до шлюбу, фізичне насильство чоловіка над молодістю жінкою тощо.

**Ключові слова:** Галичина, українці, сільське населення, шлюбно-сімейні відносини, шлюб, сім'я.

**The Problem Statement.** In the first half of the XXth century the Ukrainian society was a stateless community, which was a part of the Austro-Hungarian Empire (until 1918) and the Second Commonwealth (until 1939). The above-mentioned factor had influence on all spheres of socio-political, socio-economic and private discourse. However, if we talk about Eastern Galicia (Halychyna), the number of the Ukrainians was obviously predominant (Pasitska, 2019, p. 71), who maintained the traditional way of life. Of course, direct coexistence with the Poles, the Jews, the Germans, and members of other ethnic minorities also affected their daily lives, but in marital and family relationships the impact was negligible.

Marital and family relations were regulated by various legislative civil acts (until 1933 – the Austrian Civil Code of 1811, hence – the laws of the Polish state) (Kulchytskyi & Levytska, 2009, p. 47). Thus, the norms of customary law and the canonical dogmas of the church prevailed in an everyday life. The Ukrainian Greek Catholic Church had a dominant influence in the marital relations of the Ukrainians in Galicia. According to Lviv Greek Catholic Metropolitan Consistory, diverse aspects of the Ukrainian family existence in the first half of the XXth century could be clarified: the age of marriage, premarital behaviour of young people, motives for choosing a spouse, reasons for divorce, etc. One of the above-mentioned aspects (motives for marriage) is the subject of our research.

**The Analysis of Recent Researches and Publications.** It would be useful to refer to the study written by Oksana Pasitska on ethno-demographic processes and social structure of the local population in order to clarify the socio-economic and cultural realities that directly affected the marital and family relations in Galicia of period under analysis (Pasitska, 2019, pp. 68–76). Petro Chornii's research on interwar Galicia (Halychyna) as the territory of a cultural frontier is also important. The ethnologist also mentioned the interethnic coexistence issues inherent in the studied region, in particular in the field of interethnic marriages, which were most often concluded by the Ukrainian burghers and the Polish burghers (Chornii, 2018, p. 207). Instead, the rural population continued to be culturally homogeneous, hence, predominantly the Ukrainian. Mariana Baidak and Ivanna Cherchovych were interested in the family existence issues of the beginning of the XXth century, in particular, the women's survival during World War I, marriage infidelity in the families of the Ukrainian intelligentsia in Galician towns, etc (Baidak, 2016; Cherchovych). But the Ukrainian scholars were not interested in marital and family relations among the rural population of Galicia in the first half of the XXth century, including the motives for creating a new family.

Numerous aspects related to marriage and family, in particular, the factors that shaped the attitude to pregnancy and future parenthood, the relationship between parents and children, social functions of the family, the influence of religion on the strength of marriage, etc., were covered by modern Western scholars (Edwards, Parmenter, O'Brien & Brown, 2018; Hwang, Cakirsoy-Aslan, Brown & Silverstein, 2020; Fang, Galambos, Nansy & Johnson, 2021; Kumar, Brock & DiLillo, 2022; Pessin, Rutigliano & Haddock, 2022).

**The purpose of the research** is to bring out the main motives and principles of the Galician Ukrainian married couple choice in the first half of the XXth century, their change/stability as compared to the previous historical period – the XIXth century.

**The Results of the Research.** The analysis of the main trends and changes that took place in the field of marital and family relations of the Ukrainians in the Galician countryside should be considered in a broad narrative of socio-political and economic transformations of the first half of the XXth century. In particular, the agrarian overpopulation issue was important. According to modern researchers, in the mid-20s of the last century, the surplus

labour force in the western Ukrainian village amounted to 1,500,000 people (Kacharaba, 2003, p. 37). Emigration to Canada, the United States and other countries could really improve the situation. But it had a negative effect on the ethnicity of the population of Eastern Galicia (fewer Ukrainians and more Poles, so the Polish government supported the emigration process), and ultimately on the personal destiny of each emigrant, his/her family and family life. In the best case, they emigrated with their nuclear families or even with all relatives. However, due to the high financial costs of travelling overseas, mostly men dared to emigrate. Their main incentive was to earn money, settle down in a new place, and only then take their wives with children. Although in a real life, the majority of those plans did not come true: emigrated men formed up new families, went missing, died of diseases, and etc. In the case file of Lviv Greek Catholic Metropolitan Consistory, where women/men applied to recognize their husbands/wives as dead abroad and to be able to get married once again, we came across diverse documentary evidence: “A peasant woman asks for permission to marry a man after six years of her husband’s death in Canada, because she takes care of a mother, an ill sister and three children, and can work on a field of 10 morhiv only half of a plot because there is no one to work on it” (Central State Historical Archive of Ukraine in Lviv (CSHAUL), f. 201, d. 2 a, c. 255, p. 12).

It should be mentioned that other, no less important, circumstances, which also had influence on the motives for creating a new family were World War I and then the Ukrainian-Polish War, which caused thousands of men to join the army. Their stay away from the family disrupted the usual rhythm of an everyday life. Because of that children were in need, their own household dilapidated. The entire burden of hard physical labour, in fact, fell on the hands of women and children. In wartime, there was even a new motivation for marriage – in some places fictitious marriage was practiced for political reasons, as it was mentioned in by one of the archives documents: “The man married an Orthodox woman in Proskurov (nowadays – Khmelnytsky) in order to obtain the marriage metrics because without it, it was impossible to return [...] home to Galicia, and because he could not get rid of the Soviet army in other way” (CSHAUL, f. 201, d. 2 a, c. 519, p. 30).

People appealed to the ecclesiastical court for two purposes: on the one hand, to declare the missing member of the couple dead and to annul the marriage, on the other hand, to officially announce the petitioner’s wish to have a private life for a second time. The fact is that the civil authority document was not enough to get divorced, because it did not give the right to remarry in the church. Archival materials gave evidence that the main motives that instigated a parishioner to seek remarriage were the economic need and the social/church pressure. Speaking of the church pressure, we mean the undeniable influence of the church on the rural community. The community members’ and the priest’s opinion were always taken into consideration, because they “corrected” the wrong behaviour of peasants, forced them to ask the church to terminate the marriage formally, and to obtain permission to legalize illegal relations, namely, marriage “by faith”, “concubinage”, etc.

It should be mentioned that unregistered marriages or marriages “by faith” existed for a long time. Back in the XIXth century, the Ukrainians of the Carpathians justified such kinds of marriages due to the lack of money for civil ceremonies and church weddings (Horyn, 1993, p. 175). Unregistered marriages were considered to be immoral, especially when a child was born as a consequence of a “savage” cohabitation. Mothers-pokrytky (a woman who gave birth to a child without being married) were beaten by various means and even expelled from the village, forced to lie in a form of a cross in the church during the Liturgy, etc. (Hoshko, 1999,

p. 188; Hlushko & Khomchak, 2017, pp. 143, 417, 442, 471–472). Fines were also imposed on them – the so-called “bykove” (“fornication”) (Hoshko, 1999, p. 191). At the beginning of the XXth century, of course, those methods of punishment were no longer used, but the community influence continued to be sufficient for the couple to care about their reputation: “The husband went missing in the Russian captivity. She can’t cope with the children and the household, she lives with her fiancé and is even carrying his child (*pregnant*. – *Authors*), so she will continue to live in a savage marriage” (CSHAUL, f. 201, d. 2 a, c. 184, p. 37). According to the archival case, which was indicative, “a husband filed a lawsuit after 24 years of the wife’s disappearance in America”. The document stated the following “he already lives in an unregistered marriage with Kateryna and has a 16-year-old daughter with her. But living together without church wedding ceremony causes deterioration in the parokhiya (*dissatisfaction in the parish*. – *Authors*)” (CSHAUL, f. 201, d. 2 a, c. 302, p. 60).

Although the economic factors concerning remarriage were key, especially for widows/widowers, when the applicants were left alone with young children or elderly parents. Only by creating a new family the mistress (master) could survive, save her “farming property” (*gazdivstvo*), properly cultivate the field, take care of livestock, etc.: “The man wants to get remarried, because there is no one to bake bread, or cook food, or wash clothes/do laundry” (CSHAUL, f. 201, d. 2 a, c. 394, p. 5); “I have a medium-sized farming property, where there is no one to work because my old father is weak, so I have to get married for a second time” (CSHAUL, f. 201, d. 2 a, c. 467, p. 14); “The husband went missing in 1914 and the wife sued 10 years later. She asks to get remarried to the widower because she is indigent, she needs a master, a guardian of the child, and Ivan can’t do without the landlady in the house with the children” (CSHAUL, f. 201, d. 2 a, c. 467, p. 17); “I have to get married because I don’t have a master. The houses are being destroyed, the barn has not been finished for two years, and there is no one to work on the field” (CSHAUL, f. 201, d. 2 a, c. 261, p. 45); “The husband did not get back from the Austrian war and there is no news. And the wife was left alone with six children and could not run the farming property without the husband’s help” (CSHAUL, f. 201, d. 2 a, c. 504, p. 25).

If the remarriage was accompanied by coercion from the parents in order to preserve the family property, the following family was created with the unmarried brother/sister of the ex-husband/wife: “The court found Ivan dead in the Polish-Ukrainian War, and his wife, who lives under the same roof with the mother and brother of the deceased, committed a sin – they have a child – they want to be able to marry legally” (CSHAUL, f. 201, d. 2 a, c. 451, p. 26); “The groom, a childless widower *udidychyv* (*inherited* – *Authors*) the whole reality (*property* – *Authors*) after the death of his wife. He wished that the property did not fall into the wrong hands, so he wants to marry the sister of the dead woman” (CSHAUL, f. 201, d. 2 a, c. 375, p. 24).

The parents forced their children into marriage, in particular, remarriage, in the pursuit of the noble goal of ensuring the proper economic well-being of the family and its high social status in the rural community. Finally, the community itself and even the ecclesiastical court recognized the authoritative or authoritarian parental influence in the above-mentioned process: “I thought that shouting and fighting would not do any harm because it often happens that parents force a child, and then life somehow goes on, sticks together” (CSHAUL, f. 201, d. 2 a, c. 211, p. 10); “The relatives admit that they forced (*to get married*. – *Authors*), because they thought that they would eventually agree because the young man had his own farm and then in the immediate vicinity – the border to the border” (CSHAUL, f. 201, d. 2 a, c. 258, p. 5).

The materials of Lviv Greek Catholic Metropolitan Consistory contain other reliable evidence of the significant spread of coercion by parents in marriages between the rural

youth in the 20s and 30s of the XXth century, for instance: “Both parties did not have the true and free will to marry, because they acted under the coercion of relatives who threatened [...] that they would not give any property” (CSHAUL, f. 201, d. 2 a, c. 394, p. 2); “She told the priest before the marriage: “I am beaten at home, sent off to him and I have to do as they say” (CSHAUL, f. 201, d. 2 a, c. 360, p. 1); “I didn’t want to marry Matviy, but my father insisted on it, and I followed my father’s will” (CSHAUL, f. 201, d. 2 a, c. 360, p. 2); “Forced to marry by relatives, got married at the age of 14,5 because he was rich, and my relatives had four morhiv of field and seven children” (CSHAUL, f. 201, d. 2 a, c. 311, p. 4); “I did not dare to go against their will for fear of beatings, and these beatings were often very severe” (CSHAUL, f. 201, d. 2 a, c. 311, p. 13); “He (*the husband. – Authors*) did not ask me if I would marry him or not, he only talked to my father. And daddy threatened me: “I will kill you, I will accept pryimakiv (orphans), and I will send you to a hundred of winds” (CSHAUL, f. 201, d. 2 a, c. 211, p. 7).

Under a psychological pressure of pragmatic parents, underage (even fourteen-year-old) girls were powerless. In the materials of one of the cases, an adult woman mentioned the compulsion of her mother to marry, who chose a groom for her and, was persuading her daughter, convinced her that there was a war around and all decent guys went to war, so she could not find the best couple in her native village. And although it was “difficult to go against her will and she did not have the desire to live with the unloved man..., but she was glad to obey her mother” (CSHAUL, f. 201, d. 2 a, c. 355, p. 13).

The significant spread of early marriages among the Galician Ukrainians of the first half of the XXth century, including marriages for economic reasons, was confirmed by written appeals of parents/guardians to Lviv Greek Catholic Metropolitan Consistory, which included one request – to allow church marriage for their minor children (CSHAUL, f. 201, d. 2 a, c. 209, p. 7). There were also the official documents forgeries, which overestimated the age of girls: “The father even forged the birth certificate of his daughter, who at the time of the church wedding was not 16 but 15 years old” (CSHAUL, f. 201, d. 2a, c. 211, p. 46).

Orphans and illegitimate children, who were deprived of their father’s name and the right to inherit property of their biological father, were particularly vulnerable to forced marriage. By the way, there was no affinity between the illegitimate and legal children of one father, except for the obstacle to marriage between them (Onyshko, 2016, p. 56). Unmarried/single mothers (*pokrytky*) and ordinary girls, who were born into a family with many daughters, and for each of them there had to be prepared a dowry, also felt vulnerable. Husbands treated orphans and *pokrytky*, to put it mildly, not the best way. According to the materials of one archival file the following was stated: “The next day [after marriage] I told my mother that I would not live with her because I hated her. And the fact that my wife is *pokrytka*, I can’t even look at her” (CSHAUL, f. 201, d. 2 a, c. 506, p. 3).

Unfortunately, neither family members, neighbours, nor even priests responded to suffering of such women: “The Father said in the premarital protocol: “It’s a pity for your child”, but I conducted church wedding. And after two Sundays she ran away from home to Lviv to serve” (CSHAUL, f. 201, d. 2 a, c. 360, p. 2).

Absence of any romantic feelings in the marital relationship, on the contrary, presence of coercion was evidenced by archival sources that directly relate to the behaviour of a young couple, their morale state and mood before marriage protocol and during wedding, including a groom’s brutal attitude towards a bride: “She went to the protocol involuntary, cried before marrying” (CSHAUL, f. 201, d. 2 a, c. 211, p. 11); “During the wedding, a groom beat her

and threatened to hang her” (CSHAUL, f. 201, d. 2 a, c. 211, p. 5); “As Herasym drulyv her (*pushed*. – *Authors*) to the wall before the wedding so that the girls had to pour water on her head” (CSHAUL, f. 201, d. 2 a, c. 258, p. 31).

Furthermore, coercion and violence in the Ukrainian Galician rural families of the first half of the XXth century were considered to be the norm and usual reality, because: “... The population of that area has bad blood and is hot-tempered and therefore rudeness of behaviour in families is on the agenda but despite that they live together” – was written in one of the documents” (CSHAUL, f. 201, d. 2 a, c. 223, p. 6).

It should be mentioned that married but still underage women were particularly affected by physical violence. In general, in the majority of European countries the minimum age for marriage issues was regulated by civil law in the first half of the XXth century. In addition, other norms of communication (courtship, premarital behaviour, marital choice, etc.) depended on the ethnic customs, traditions and national morals. At that time, in Galicia (Halychyna), the age of marriage was also regulated by official laws, but in rural areas they were often ignored and replaced by customary law and economic expediency. Hence, the population of Boykivshchyna accepted and practiced early marriages (at the age of 15 – 17 for girls and 18 – 20 for boys) primarily due to economic factors. At the beginning of the XXth century, the local children lived with their parents (“up to 14 souls in the house”), so that the father and mother tried to marry the eldest daughter as soon as possible (Halko, 2001, p. 42). Instead, her transfer to her husband’s family had a positive effect on her, as the daughter-in-law’s dowry was necessarily a plot of land – an important basis for successful farming activity. High infant mortality was also one of the causes of early marriages. The important idea was to fill up the shortage of labour with new young family members, who will increase the family budget (Isaievych, Fedoriv).

The tradition of early marriages could be seen not only among the Ukrainians but also among other Slavs. Hence, for the Poles, the age of marriage was determined primarily by the economic needs of the family in the labour force. There were cases when a 17-year-old son married an older but hard-working and wealthy girl at the beginning of the XXth century (Gantskaya, 1986, p. 22). The land was considered synonymous with their wealth as well as for the Ukrainians. That is why the Poles ironically called marriage with landless peasants “to get married to the wind” (Gantskaya, 1986, p. 26). Even at the beginning of the XXth century, the marriage partner choice was the prerogative primarily of the parents of the future couple.

However, some ethnologists believe that the parents’ consent was not crucial during the marriage of the Ukrainians. In particular, the above-mentioned opinion was expressed by Yuriy Hoshko, a renowned researcher on the customary law of the population of the Eastern Carpathians (Hoshko, 1999, p. 243). Although the archival and ethnographic materials presented by us provide evidence of the opposite. Furthermore, the Ukrainians condemned mostly illegal marriage, in particular *uvody* (escape) marriages, when a young man with the bride’s consent, but without parental approval, kidnapped her (Sliusar, 2011, p. 64). It was a typical manifestation of social deviation, which a rural community did not approve of; the well-accepted norm was the choice of a couple, especially when parents had a decisive vote. Usually, agreement on future marriage of children and size of their dowry were discussed at *zmovynakh* (meeting), and discussion ended at the courtship. In some nations, there was even the so-called cradle courtship, when parents agreed on marriage of young children (Kashuba, 1988, p. 87).

In the XIXth century, girls and boys, who dared to marry without their parents’ will and consent did not receive their blessing, were deprived of the right to receive a dowry, and lost

their inherited property (parents could “make a will invalid”) (Isaievych, Fedoriv). Economic sanctions were especially effective in the above-mentioned case (Gantskaya, 1986, p. 97). Instead, if the choice of a son or daughter was correct and successful, the amount of property inherited by a child, parents could significantly increase: “I was very happy that my son chose a calm and kind girl for his wife, and for that reason, we gave Ivan more soil than other our children” (CSHAUL, f. 201, d. 2 a, c. 451, p. 15). It should also be admitted that such sanctions were largely effective, as a woman’s fate, place and role in the future family depended in many cases on her own property: the greater it was, the freer and more independent a woman felt. The situation was similar to a man, who was “adopted” by a girl’s family. If the pryimak (adopted husband) did not contribute a certain amount of money to his wife’s household, he was considered powerless (“the pryimak doesn’t have any vote”) (Gantskaya, 1986, p. 98).

In addition, the term “prymak” has a broader meaning in traditional Ukrainian culture. In particular, this word was used to describe a child from a large family, which was most often taken by wealthy childless people in order to have a helping hand about the house later and, what is crucial in our context, to inherit the “soil”, all farming property. Sometimes the childless family adopted a boy and a girl at once, and then to form up a separate family which consisted of them (Horyn, 1993, pp. 23–24), or to marry an adopted child with a member of their family (Rudyi, 2012, p. 110). Accordingly, property was not divided, but remained within one family, but young people were deprived of a real right to choose a married couple in advance.

It is obvious that the institute of *vina*, as well as dowry, led to marriages of people equal in social and property relations. Instead, “unequal” marriages were treated as an anomalous phenomenon in the traditional environment. Hence, one of the petitioners, who demanded the ecclesiastical court to declare her missing husband dead in the war and allow her to marry another man, mentioned the following: “He loved me very much [the first husband] and married me against the will of the family, who protested that I had no property” (CSHAUL, f. 201, d. 2 a, c. 184, p. 95).

When it came to a positive reputation of a family in a village, attention was paid primarily to the property status and attitude of its members to work. Hence, not only the Ukrainians but also many other peoples of Europe, considered an economic factor to be the main thing during marriage. For instance, the Slovaks said the following: “Flax with flax, hemp with hemp, field to field, and equal to equal” (Gratsianskaya, 1988, p. 39). In some parts of Romania, the girl’s dowry was even displayed in the yard (Rikman, 1988, p. 168).

In the first half of the XXth century, the Ukrainians in Galicia also adhered strictly to the principle of religious endogamy, i. e., they created families within their community, mostly homogeneous in religion. Their constant relations with the representatives of other local ethnic groups (the Poles, the Jews, the Germans, etc.) were primarily good-neighborly and businesslike. On the other hand, the interethnic and interfaith marriages occurred in very rare cases. In particular, the Jews were sometimes “baptized” in order to marry the Ukrainian women. There were no religious taboos on marriages between the Roman and the Greek Catholics. Hence, among the archival materials of Lviv Greek Catholic Metropolitan Consistory, we came across a request from a Roman Catholic girl to grant her permission to marry a Greek Catholic (CSHAUL, f. 201, d. 2 a, c. 316, p. 19). Among these sources, there were the pleas of an evangelical widower with many children for permission to marry a widow of the Greek Catholic rite, and the “groom” promised “to give all the children to the Greek Catholic Church” (CSHAUL, f. 201, d. 2 a, c. 420, p. 1).

In a traditional society the premarital communication of young people was limited to the territory of their village, in addition to the principles of socio-property and national religious endogamy, which guided the choice of the couple, and followed a local territorial endogamy. Within their village, such marriages were characteristic not only in the XIXth but also at the beginning of the XXth century. At the same time, it created contradictions and problems, because, let's say, finding a couple in a small village, especially for a poor young man, was very difficult, which led to marriage between relatives. On the one hand, blood ties were condemned by people, because it was believed that in such marriage weak children were born, even cripples (Halko, 2001, p. 41). On the other hand, according to archival sources, forming up a family between close relatives was not uncommon, especially when they wanted to preserve property or reunite neighbouring "soil". Hence, in the consistory court it was very often asked for permission to marry people with blood ties: "Young people ask the Court for permission to marry, because the obstacle is kinship in the third degree, because the bride will be exposed to disgrace in people, and is a poor girl and cannot expect a more appropriate groom" (CSHAUL, f. 201, d. 2 a, c. 420, p. 9); "They are asking for permission to marry a blood relative, because a bride is 25 years old. They give her a small piece of field – and a groom should marry her with a little vini" (CSHAUL, f. 201, d. 2 a, p. 375, p. 1); "The people are poor, it is not easy for them to find a suitable spouse, because the village is small, and it is complicated and difficult for a poor person to marry in other villages. And their gardens border" (CSHAUL, f. 201, d. 2 a, p. 375, p. 11) – it was stated in the documents.

**The Conclusions.** When it came to choosing a future couple, the Galician Ukrainian peasants were guided by different motives, stuck to certain principles and rules, the majority of which were characteristic of the previous (XIXth) century. Those were, in particular, pragmatic property interests – the desire to increase their own wealth, unite neighbouring lands, prevent the division of property, and etc. Social stability and a positive reputation for the future family were of utmost importance to the peasants. By the way, the positive reputation of the future family depended not only on the availability of movable and immovable property, land and livestock, but also on the legitimacy of marriage in the eyes of the community and the church. That is why, in archival materials a significant part of cases concerned the legalization of marriages "by faith", especially between widows. The Galician rural population also kept to the principle of social, territorial and religious endogamy, while violating the ban on marriage between close relatives. The first half of the XXth century was also characterized by the political motive of marriage and the motive of economic survival under conditions of war and emigration. Archival materials also prove convincingly that the social status and economic stability of the rural community were appreciated more than love or amicable relations in the family. Hence, early marriages, economic sanctions and coercion of parents to marry, physical violence of a man against a young woman, etc., were commonplace.

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**ARTILLERY OFFICERS' ROLE IN THE UKRAINIAN ARMIES FORMATION  
AT THE OUTBREAK OF THE UKRAINIAN REVOLUTION OF 1917 – 1921**

**Abstract.** *The purpose of the research is to analyze the artillery officers' role in the armies artillery formation of the Ukrainian People's Republic (UNR) (since 1917) and the Western Ukrainian People's Republic (ZUNR) (since 1918), when the Ukrainian revolution of 1917 – 1921 broke out. The methodology of the research is based on the principles of objectivity, historicism, as well as the use of methods of analysis, synthesis, generalization. The scientific novelty is that, in spite of the presence of diverse studies on the officer corps in the historiography of the Ukrainian Revolution of 1917 – 1921, the artillery officers' role in the formation of artillery of the UNR / ZUNR armies was not clarified comprehensively. On the basis of official and unofficial documents, as well as memoirs of military and political figures of the UNR / ZUNR era, the artillery officers' efficacy and their impact on the combat readiness of artillery units have been analyzed. The efficacy and impact are considered to be one of the determining factors. The Conclusions.* After the Russian and Austro-Hungarian Empires collapse, the Ukrainian people had the opportunity to build an independent state, but it was impossible to achieve this goal without the army ready for combat. The officers, who became the driving force of

the Ukrainization process of corps, brigades and regiments of the former empires (in the summer and autumn of 1917, the Ukrainization of 17 light artillery brigades and 102 batteries of the Russian army; in November of 1918, the Ukrainization of the 33rd Artillery Regiment of the Austro-Hungarian Empire), played an important role in the formation of the first military units of the Ukrainian army. The first Ukrainian artillery divisions and batteries began to be formed on the initiative of the artillery officers (on January 1, 1918, on the initiative of O. Almazov, a cavalry and artillery division was formed; in January of 1918, under the leadership of K. Smovskiy, a cannon battery of the Haydamatskyi Kish of Slobidska Ukraine was formed, at the beginning of January of 1918 a separate cannon battery was formed in R. Dashkevych's Galician-Bukovynian Kurin, during December of 1918, on the initiative of S. Leshchi and other officers, cannon kish was formed in Kolomyia, Stanislaviv, Stryi, Sambir, Chortkiv, Ternopil, and Zolochiv), as evidenced by the memoirs of the direct participants in the events. The artillery officers were the most active among the large corps of officers of the Ukrainian army and made plenty of efforts in order to form the artillery of the UNR (since 1917) and ZUNR (since 1918). In spite of certain difficulties, which were caused by the external military threat and internal political contradictions, the process of army formation took place and played an important role in the formation of the Ukrainian statehood during the Ukrainian Revolution of 1917 – 1921.

**Key words:** artillery officers, the UNR army, Galician Army, Ukrainian revolution of 1917 – 1921, Ukraine, artillery.

## РОЛЬ СТАРШИН-АРТИЛЕРИСТІВ У ФОРМУВАННІ УКРАЇНСЬКИХ АРМІЙ НА ПОЧАТКУ УКРАЇНСЬКОЇ РЕВОЛЮЦІЇ 1917 – 1921 РР.

**Анотація. Мета дослідження:** проаналізувати роль старшин-артилеристів у формуванні артилерії армій УНР (з 1917 р.) та ЗУНР (з 1918 р.) на початку Української революції 1917 – 1921 рр. **Методологія дослідження** ґрунтується на принципах об'єктивності, історизму, а також використанні методів аналізу, синтезу, узагальнення. **Наукова новизна** полягає у тому, що, незважаючи на наявність в історіографії Української революції 1917 – 1921 рр. низки досліджень офіцерського корпусу, досі не було комплексно з'ясовано роль старшин-артилеристів у формуванні артилерії армій УНР/ЗУНР. На основі офіційних та неофіційних документів, а також спогадів військових і громадсько-політичних діячів доби УНР/ЗУНР проаналізовано ефективність діяльності старшин-артилеристів та їх вплив на бойову готовність артилерійських частин, що є одним із визначальних факторів боєздатності збройних сил загалом. **Висновки.** Внаслідок розвалу Російської і Австро-Угорської імперій в українського народу з'явилась можливість збудувати незалежну державу, однак досягти цієї мети було неможливо без боєздатної армії. Важливу роль у формуванні перших військових частин українського війська відіграли офіцери, які стали двигуном процесу українізації корпусів, бригад і полків колишніх імперій (улітку-восени 1917 р. українізація 17 легких гарматних бригад та 102-х батареї російської армії, з листопада 1918 р. українізація 33-го гарматного полку армії Австро-Угорської імперії). З ініціативи старшин-артилеристів почали формуватися перші українські гарматні дивізіони та батареї (1 січня 1918 р. з ініціативи О. Алмазова було сформовано кінно-гарматний дивізіон, в січні 1918 р. під керівництвом К. Смовського – гарматну батарею Гайдамацького коша Слобідської України, на початку січня 1918 р. – окрему гарматну батарею в Галицько-Буковинському курені Р. Дашкевича, протягом грудня 1918 р. з ініціативи С. Леція та інших старшин утворено гарматні коші в Коломиї, Станислові, Стрию, Самборі, Чорткові, Тернополі і Золочеві), про що свідчать спогади безпосередніх учасників подій. Серед численного корпусу офіцерів українського війська, старшини-артилеристи були одними із найактивніших та доклали багато зусиль для формування артилерії армій УНР (з 1917 р.) та ЗУНР (з 1918 р.). Попри певні труднощі, зумовлені зовнішньою військовою загрозою та внутрішньополітичними суперечностями, процес формування війська відбувся та відіграв важливу роль у становленні української державності в період Української революції 1917 – 1921 рр.

**Ключові слова:** Старшини-артилеристи, армія УНР, Галицька Армія, Українська революція 1917 – 1921 рр., Україна, артилерія.

**The Problem Statement.** The Ukrainian armies' artillery of the Ukrainian Revolution of 1917 – 1921 at the initial stage of its formation inherited the organization, tactics of hostilities, armaments and large corps of officers, primarily from the imperial armies, in which numerous Ukrainians were enrolled. It was the officers of the artillery brigades, regiments and divisions of the armies of the Russian and Austro-Hungarian Empires that became one of the main achievements of the Ukrainian armies at the stage of their formation. Equitably, there was an urgent need to build own Ukrainian army, and it was impossible to implement the task without the involvement of trained officers. The combat experience of artillery officers was particularly valuable as it was gained during World War I as well as the organizational skills acquired during military service.

There were a number of reasons (wounds, fatigue from World War I and the fervent desire to get back to the family as soon as possible) that complicated the process of involving significant Ukrainian officers in the Ukrainian armies artillery formation. Furthermore, numerous officers came under certain ideological anti-Ukrainian influences, which were cultivated by members of the Bolshevik and White movements in the military environment actively. Hence, their reliability and the feasibility of using their formation potential were brought into question. However, numerous artillery officers showed a sincere desire to serve in the Ukrainian army.

The combination of the above-mentioned reasons, mixed with the dynamic change in geopolitical conditions, required Ukrainian political leaders to take swift, decisive action in order to create a combative armed force that will be able to withstand growing threats from the Ukrainian statehood opponents. In spite of the somewhat slower pace than other branches of the military, the Ukrainization process of the artillery units and the formation of governing bodies took place, and the Ukrainian artillerymen were responsible for that.

The memoirs of military and political figures of that time contain diverse references to the artillery officers' activities. By large the effectiveness of their activities was determined not only by the combat readiness of artillery units but also by the combat effectiveness of the armed forces as a whole.

**The Analysis of Recent Researches and Publications.** The issue concerning the artillery officers' role in the Ukrainian artillery formation with the outbreak of the Ukrainian revolution of 1917 – 1921 has not been comprehensively covered by researchers yet. But some elements of the above-mentioned topic were considered in the works written by the Ukrainian and foreign historians and scholars. The publications of P. Tkachuk and L. Kryvyziuk (Tkachuk, 2007; Tkachuk & Kryvyziuk, 2012; Tkachuk & Kryvyziuk, 2017) should be noted for the completeness of the covered material. Their works covered in detail the stages of the artillery units' formation and describe the key battles with the participation of the Galician Army artillery. In addition, the issues of training officers, mainly artillery officers, were also reflected in the works partially. In general, V. Zadunaisky's research concentrated on the military organization peculiarities of the Ukrainian formations during the Ukrainian Revolution of 1917 – 1921, but the role of the officers, in particular, the artillerymen, in their formation was hardly covered (Zadunaiskyi, 2008). The works, written by M. Lytvyn (Lytvyn, 1998), Ya. Tynchenko (Tynchenko, 2011) and R. Tiutenko (Tiutenko, 2018) were more balanced in this respect. The generalized work of the Polish researcher G. Skrukwa, devoted to the structure of the Ukrainian People's Republic army in the crisis and the formation of the Ukrainian corps of officers in revolutionary conditions should also be mentioned (Skrukwa, 2008).

In order to analyze the role of key figures (the artillery officers), the authors considered memoirs and biographical studies of military and political figures of the UNR / ZUNR,

including M. Hrushevsky, P. Skoropadsky, P. Yeroshevych, M. Omelianovych-Pavlenko, K. Smovsky, R. Dashkevych, S. Matskevych and the others.

**The Purpose of the Research.** In our research, we aim at analyzing the artillery officers' role in the artillery formation of the armies of the Ukrainian People's Republic (UNR) (since 1917) and the Western Ukrainian People's Republic (ZUNR) (since 1918), when the Ukrainian revolution of 1917 – 1921 broke out, based on the memoirs of officers and archival materials.

**The Results of the Research.** The February Revolution of 1917 in Russia and the revolutionary processes in the Habsburg Empire in the autumn of 1918 caused the collapse of the Russian and Austro-Hungarian monarchies. As a result of the above-mentioned changes, socio-political life in the Ukrainian lands became more active and transformed into the National Liberation Movement, from which the state-building processes began. With the establishment of the Tsentralna Rada (Central Council of Ukraine) (March of 1917) (hereinafter CCU) and the State Secretariat (on November 9, 1918), the Ukrainian political leaders faced a serious military threat from outside immediately: from the Bolshevik and White Movements, which, as a result of the monarchical system collapse, spread rapidly across the territory of the former Russian Empire, and from Poland (restored in November of 1918) (Mahochiĭ, 2007, pp. 441–442). Among the internal problems there were discrepancies among the political leadership regarding the views on the future of Ukrainian states. Despite the difficult conditions that prevailed after World War I and the urgent need to protect the Ukrainian lands, there was no united position of solidarity on the creation of its own army, among the Ukrainian states leaders (Demianiuk, 2017, p. 165).

Hence, the state-building processes, in particular the formation and development of the Ukrainian armed forces with the outbreak of the Ukrainian revolution of 1917 – 1921, took place under the influence of internal political uncertainty and intense struggle on several fronts with external enemies (Verstiuk, 2003, p. 73).

It should be mentioned that in the context of building state institutions, the peculiarity of the Ukrainian armies' formation was that the above-mentioned process unfolded and gained strength from the bottom, and its large scale came as a complete surprise to the political elite (Horielov, 2007, pp. 298–310). The first Ukrainian military communities were created already in February–March of 1917 in the Russian army, and later on – the Ukrainian Corps Councils and Army Committees were formed (Yevtymovych, 1937).

Unfortunately, the National Liberation Movement leaders did not have a clear vision of the directions for the formation of their own armed forces (Lebedieva & Komova, 2021, p. 127). M. Hrushevsky, depicting the situation at the time, made the following conclusion: “There was nothing unexpected in the fact that the Ukrainian organizational wave was the strongest in military circles – the army, in general, gathered the very blossom, the very strength of citizens, and during the Russian revolution in general, the army proved to be the most active. It was more unexpected that this movement turned out to be a demand to form new Ukrainian military units... The reason for this was the formation of the Polish legions” (Hrushevskyi, 1992, p. 16).

In contrast to Naddniprovyanshchyna (the Dnieper region), where the process of Ukrainization of the army happened relatively gradually, the Galician Army (hereinafter GA) from the first days of its existence was formed during the war with Poland, which was supported by the Triple Entente actively (Yakymovych, 2019, p. 183). The State Secretariat of the Western Ukrainian People's Republic (hereinafter ZUNR) was in a predicament as it did not have significant mobilization resources, as about 100 000 Ukrainians were

enrolled during the war by the Austrian government and sent to distant Balkan fronts mostly (according to L. Shankovsky – more than 30 infantry, cannon, cavalry regiments) (Shankovskiy, 1999, p. 43). Therefore, the calls of the government of the Western Ukrainian People's Republic to the Galicians to protect their homeland were initially in vain. However, as in Nadnipyrianshchyna (the Dnieper region), the process of formation and creation of the first military units of the GA (combat groups “Sokal”, “Uhniv”, “Yavoriv”, “Stare Selo”, “Navariya”, etc.) was mainly characterized by spontaneity and mostly on the initiative of energetic Ukrainian officers (Mykytiuk, 1958, p. 77).

A common aspect for the Ukrainian armies at the initial stage of its formation was that, despite the imperfections of the building strategies of the political elite, the military played a leading role in the formation of the armed forces, among which the officer corps played a decisive role.

The organizational structure of the Ukrainian armed forces when the liberation struggles of 1917 – 1921 outburst, basically corresponded to the structure of the armies of the leading countries participating in World War I, in which the Ukrainians were the most numerous. The military formations of Nadnipyrianshchyna (the Dnieper region) borrowed the experience of the Russian army mostly, and the Galician Army favoured the Austro-Hungarian army experience. In different respects, both Ukrainian armies had their own characteristics, but the general structure of the ground forces was similar, consisting mainly of infantry, cavalry, engineering and armored units, as well as one of the most capable weapons at that time – artillery.

The process of forming artillery in the military formations of Nadnipyrianshchyna (the Dnieper region) actually set about with the Congress of Ukrainian artillerymen of the Reserve Army in Kazan, which took place on May 11, 1917. During the Congress, the delegates formed the Ukrainian Military Committee, which was headed by Colonel Savchenko and passed a resolution on the formation of the Ukrainian artillery batteries, divisions and brigades, sending a military delegation to Kyiv (CSASUGU, f. 1115, d. 1, c. 32, pp. 1–2; Verstiuk, 2012, pp. 10–11). As a result, 17 light artillery brigades and 102 batteries with 612 guns were Ukrainianized as part of infantry divisions in the summer and autumn of 1917 (Kliuchenko, 1931, pp. 5–9).

In fact, the artillery formation in the Galician Army (GA) began with the Ukrainization of the 33rd Austrian Artillery Regiment in Ternopil (from November of 1918), on the basis of which the first Ukrainian artillery battery was formed, led by chetar (junior officer) Yu. Poliansky (Kuzma, 1931, pp. 189–190). The orders of the State Secretariat for Military Affairs, issued on November 13, 1918, were vital for the formation of the GA artillery, which actually stimulated the process of mobilization (there were some difficulties with the mobilization when the war broke out) and the formation of twenty military districts: Lviv, Stanislaviv, Przemyśl, Stryi, Ternopil, Chernivtsi, Sambir, Zolochiv, Kolomyia, Chortkiv and the others. 12 district and 60 county military teams were formed, which played an important role in the formation of the GA artillery, as they were later entrusted with mobilization tasks, recruits training and officers training, in particular for the artillery (Kvasniuk, 2019, p. 115; Vistnyk Derzhavnoho Sekretariatu Viiskovykh Sprav, 1918).

In general, at the initial stage of its formation the artillery of the Ukrainian armies inherited, in addition to the organizational structure, tactics of hostilities, armaments, a large officer corps of the Ukrainians, many of whom served in the former imperial armies.

Taking into consideration the fact that there was a drastic need to defend their own lands, the Ukrainian government concerning the matters of building its own Ukrainian army relied

on the officers, who became the “personnel foundation” of the armed forces without any exaggeration. It should be mentioned that at the stage the Ukrainian army formation, the artillery officers, artillery brigades, regiments and divisions of the armies of the Russian and Austro-Hungarian Empires became one of the main achievements. The combat experience of the artillery officers gained during their participation in World War I, and managerial skills acquired during military service were particularly valuable. The motivation and system of values, built upon the vivid examples of outstanding Ukrainian military victories of the past, provided the officers with the best understanding of the uniqueness of the chance given to the Ukrainian people to gain independence.

Oleksandr Ackermann, Artillery General, Chief of the Corps Artillery since the 27<sup>th</sup> of April, 1917, made a significant contribution to the Ukrainianization of the first artillery units of Nadniproshchyna (the Dnieper region), which were stationed in Bila Tserkva, Berdychiv and Vinnytsia and became the part of the 1st Ukrainian Corps (former the 34th Corps of the Russian Army). O. Ackermann, as part of the corps, was involved in the disarmament of the Bolshevik 2nd Guards Corps of Ye. Bosch in the autumn of 1917, who aimed at overthrowing the Central Council of Ukraine in Kyiv (Hai-Nyzhnyk, 2011, pp. 78–79). Pavlo Skoropadsky, who commanded the 1st Ukrainian Corps, recalling, made the following conclusion: “A remarkable person, my artillery inspector General Ackermann, put a lot of work into its development” (Skoropadskyi, 1995, p. 23). The artillery units of the corps were one of the most organized and combat-ready, although they were formed in the rear, and it contributed to the result of Ukrainization (Tkachuk, 2009, p. 134).

Among the front artillery, which later became part of the 2nd Zaporizhzhia Corps of the Central Council (Tsentralna Rada), it should be emphasized that Vasyl Kyrei, General, had a high level of motivation and fervent desire to serve the Ukrainian people, who carried out the Ukrainianization of artillery units and recruited more than 80% of the Ukrainians (Kolianchuk & Lytvyn, 1995, p. 163). The artillery of the corps, headed by V. Kyrei from April to autumn of 1917, numbered 27 gun batteries (108 guns). Later on he was replaced in this position by another artillery officer – Colonel V. Afanasiyev in the autumn of 1917 (Tkachuk, 2009, p. 135).

It should be mentioned that the Ukrainianization of the artillery brigades of the 11th Corps under the command of General P. Yeroshevych was quite organized: he paid much attention to the formation of the artillery of the 12th Division, which consisted of the Ukrainians and occupied an important place in the combat readiness of the Central Council troops. P. Yeroshevych recalled that after the collapse of the Russian army in November of 1917 he managed to withdraw from the front at the disposal of the Ukrainian General Military Committee six batteries (36 guns) in the 12th Division (Yeroshevych, 1939, p. 9).

Odesa Serhiivska Artillery School, which was Ukrainianized in the autumn of 1917 under the leadership of General Andriy Nilus, played an important role in the formation of the Ukrainian artillery and training of officers for the military formations of Nadniproshchyna (the Dnieper region). Mykhailo Omelianovych-Pavlenko, who commanded the infantry school at that time, recollected about A. Nilus: “He was an educated and highly authoritative person among the school staff. In this terrible time he was able to defend the position of the school, which allowed the normal continuation of training of future artillery officers” (Omelianovych-Pavlenko, 2002, p. 52).

In addition to the Ukrainianization of the former artillery units of the Russian Empire, on the initiative of the officers, volunteer artillery units (separate artillery batteries and

divisions) were actively formed, which strengthened the artillery of the Central Council troops significantly. Among the first officers to lead this process were: O. Almazov (on January 1, 1918 he headed the cavalry and artillery division), K. Smovsky (in January of 1918 he created and headed the artillery battery of the Haydamatsky Kish of Slobidska Ukraine), R. Dashkevych (at the beginning of January of 1918 he created and headed a separate artillery battery in Galicia-Bukovyna kyren') and the others (Lytvyn & Naumenko, 2004, pp. 94–95).

There were often cases when the decisive actions taken by the officers allowed to attract a significant amount of weapons for the Ukrainian artillery, as K. Smovsky described it in detail in his memoirs: Colonel V. Afanasiyev ordered to organize one battery with horsepower. "The Kish headquarters has information that many echelons of cannon units from different fronts are gathering at Darnytsia station, including the Ukrainianized ones...". Having arrived at the railway station, K. Smovsky, along with a team of young cadets, began negotiations with the command of the division. As the officers did not support the request of the Kish headquarters (to gather instantaneously and go to the Ukrainian front in full force), and the soldiers began to plunder military property, K. Smovsky ordered the fire brigade to retreat 150 steps and take up firing positions. "You must follow my orders exactly, because otherwise the mob can crush us". K. Smovsky turned to his subordinates. Then he shouted: "Go away immediately, because we will shoot!" However, only after the fire was opened over their heads, the "soldier" ran in different directions, and K. Smovsky gave order to his driver to hook up with the echelons of the division, three more cars with heavy guns, which were on the next platform and go to the Haydamatsky Kish (Smovsky, 1935, pp. 141–144).

In some places, the property needed for artillery batteries could be obtained only due to the personal qualities of the artillery officers. According to R. Dashkevych's memoirs: "The locomotive arrived at Korosten station late in the evening. Chaos reigned at the station. Hundreds of soldiers, who left their military units were waiting for trains to take them home... The Bolshevik agitators were campaigning among the soldiers, agitating against the Ukrainian government... Some batteries were being transferred to demobilization at the station...". As soon as R. Dashkevych arrived at the station, he went to the echelons to check the artillery property that was there.

When R. Dashkevych assured that it was impossible to take out guns and horses under those conditions, he decided to steal at least the cannon locks, sighting panoramas and telephones (there was the lack of them in the Kish), at night when everyone fell asleep, with the help of the station commandant, and to send everything to Zhytomyr, where the battery of the Galician-Bukovynian kyren' was (Dashkevych, 1965, pp. 13–15).

However, the anti-Ukrainian propaganda prevented more active involvement of officers in the service of the Ukrainian artillery. Later on, some units under the leadership of the Ukrainian artillery officers took part in the October Revolution in Petrograd and Moscow on the side of the Bolsheviks (the Ukrainian heavy battery on the Moscow garrison "established" the Soviet power in Tula). In some places, the political populism of government officials prevented the involvement of artillery officers in the artillery military formations of the UNR army. According to further development of events, one of the most destructive was the decision of the Central Council on the mandatory affiliation of officers, who served in the Ukrainian military units as of 1917, to any socialist party (Tynchenko, 2011, p. 89).

The above-mentioned facts mostly affected the mood of the officers corps negatively and prevented the Ukrainian General Military Committee from pursuing personnel policy more efficiently at the initial stage of the Ukrainian armies formation, in particular in the artillery.

Under the influence of the invasive actions of the Second Polish-Lithuanian Commonwealth (restored in November of 1918), the first artillery units of the Galician Army (GA), as in Nadnipyrianshchyna (the Dnieper region), were formed on the initiative of officers mainly. Further reorganization measures, which were taken after the November uprising in the army of the Western Ukrainian People's Republic (ZUNR) in January of 1919 under the leadership of Chief of Staff Ye. Mishkovsky, led to the formation of three corps of four brigades in each and one artillery regiment in each (Panas, 2015, p. 78). It should be mentioned that a great amount of attention was paid to the development of artillery; the command relied on experienced Ukrainian artillery officers, who were recruited from the army of the Austro-Hungarian Empire mainly. S. Matskevych, Commander of one of the cannon regiments, made the following remark: "Its very good organization, this one of the most important flags of the GA, owed not only to well-trained gunsmiths, but also to prominent artillery officers, commanders of batteries and regiments with their extensive combat experience and organizational skills. From the modest remnants of the Austrian army, soon these commanders formed batteries and cannon regiments so well that the artillery of the GA surpassed the Polish artillery and the artillery of Nadnipyrianshchyna" (Mykytiuk, 1958, p. 177).

The artillery kishs, played an important role in the combat readiness of the Galician army, which were founded in December of 1918 under the leadership of artillery officers (in Kolomyia, Stanislaviv, Stryi, Sambir, Chortkiv, Ternopil, and Zolochiv) under the District Military Commands (hereinafter DMC). They organized cannon batteries and sent them to the front. One of the most organized was the cannon kish in Zolochiv, commanded by Captain S. Leshchiiy. The perseverance and energy of S. Leshchiiy were described the best way by the Commander of the artillery regiment Stepan Matskevych: As soon as a new transport of abandoned guns, or brought from Zbruch, appeared at the station, they were immediately transported to the cannon kish, where they were disassembled, cleaned, lubricated and adjusted so that they were ready for combat. Then the assigned service staff was trained, took care of the horses, harness and the whole outfit, and in a few weeks a new battery grew, which was ready for combat" (Mykytiuk, 1958, pp. 179–180).

According to a historian L. Shankovsky, in general, DMC prepared and sent to the front: Zolochiv – 20 gun batteries (battery commanders S. Leshchi, V. Halan, A. Kozak, O. Tsarevych, I. Baleshta, A. Buchak, O. Melnykovich, O. Vynnychuk and the others); Stryi – 8 (T. Matskiv, I. Mykhailiv, R. Oleksiy, S. Kohut, H. Pushkar, etc.); Kolomyia – 8 (V. Totoyeskul, Ya. Kurylyuk, T. Polikha, V. Stafinyak, etc.); Stanislaviv – 7 (I. Baltro, V. Zubrytskyi, I. Medvid, A. Vaidakevych, etc.). Kishs in Ternopil, Chortkiv, Sambir organized five batteries (Shankovsky, 1999, pp. 285–286).

Despite the dynamic process of transfer of the Ukrainian artillery officers to the artillery units of the GA, the military command of the Western Ukrainian People's Republic (ZUNR) faced problems and challenges that complicated the process of attracting a significant number of officers to the service. It was primarily due to the lack of time caused by the Polish offensive. Numerous Ukrainian officers, who could potentially join the ranks of the artillery units did not return from the Italian front yet (many Ukrainians served in the Austro-Hungarian army) or were captured by the enemy (Shankovsky, 1999, p. 43). Compared to Nadnipyrianshchyna, which was the part of the Russian Empire, where military service launched career prospects for the Ukrainians, in Galicia (Halychyna), which was the part of Austria-Hungary, military service was not popular among the population. Andriy Tchaikovsky, who held the position of Sambir Povit Commissioner during the Western Ukrainian People's Republic (ZUNR),

aply described the Galicians' attitude to the service: "The majority of us hated the military uniform, like a prisoner's clothes... Antimilitarism among the Ukrainian citizens. It was promoted by the Ukrainian intelligentsia... And our youth liked this propaganda so much that they even tried to walk in that manner so that it would not resemble a direct military march" (Holubko, 2006, p. 182).

Hence, the political leaders of both the Central Council and the Western Ukrainian People's Republic made important decisions about building an army in the face of serious challenges related to the consequences of World War I. The officers, including a large number of artillery officers, became a reliable support for the Ukrainian authorities in Nadnipyanshchyna, as well as in the Western Ukrainian People's Republic. They were at the forefront of forming the combat-ready army. The effectiveness of their activities was largely determined not only by the combat readiness of artillery units but also by the combat capability of the armed forces in general.

**The Conclusions.** The desire of the Ukrainian people to gain statehood was directly related to the ability of the political leaders of the Ukrainian People's Republic (UNR) and the Western Ukrainian People's Republic (ZUNR) to build armed forces ready to combat. At that time artillery was one of the most capable weapons. Officers were the basis of the Ukrainian artillery, who played a key role in the formation of the Ukrainian armies when the Ukrainian revolution of 1917 – 1921 broke out. However, there were a number of reasons, that occurred due to the consequences of First World War I, which made it difficult to recruit significant artillery potential into the Ukrainian artillery. Among them the following reasons should be singled out:

- the external military threat from Russia (both the Bolshevik and anti-Bolshevik) and Poland;
- the lack of managerial experience of the Ukrainian government and political differences over the future of the state (including different views on the structure and size of the armed forces);
- the rapid spread of the ideological Bolshevik and White ideas in the Ukrainian military environment (career growth, populist land promises, abolition of subordination in the army, the idea of indivisible Great Russia, etc.);
- general depletion of resources after World War I (destroyed infrastructure, dead, wounded, war-weary officers, the desire to return home as soon as possible);
- distrust of the political leadership to the artillery officers, who served in the Russian army;
- the presence of a significant number of officers on the distant fronts of World War I and in captivity.

The combination of the above-mentioned reasons, mixed with the dynamic change in geopolitical conditions, required the Ukrainian political leaders to take swift, decisive action to create a capable armed force that could withstand growing threats from opponents of the Ukrainian statehood. However, despite being somewhat slower than other weapons, the process of Ukrainization and the formation of the Ukrainian artillery took place primarily due to artillery officers, many of whom showed a sincere desire to serve the Ukrainian people. This desire was, first of all, due to the following:

- the presence of a significant number of initiative and highly motivated artillery officers;
- combat and management experience of artillery officers gained during World War I and military service;

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**THE GREEKS OF THE NORTHERN BLACK SEA REGION UNDER  
CONDITIONS OF “RED TERROR” (1919 – 1921)**

**Abstract.** *One of the little-studied topics is the mass repressions by the Bolsheviks in 1919 – 1921, which received a well-known name “Red Terror”. If some episodes are well known, in terms of repression against national minorities, this issue remains among the unexplored aspects of the historical past. **The purpose** of the study is to determine the extent of repression against the Greek minority in the Northern Black Sea region on the materials of Odesa province (hubernia). **The methodological basis** of the study is a positivist approach to the reconstruction of the historical past using special historical methods: chronological, systematic, historical and biographical, historical and comparative, based on the principles of objectivity and historicism. **The scientific novelty** of the article consists in*

reconstruction of the scale of the Bolshevik repression against the Greek national community on the basis of declassified materials of the Soviet punitive authorities.

**The Conclusion.** In the materials it is shown that in 1917 – 1918 the terror of the revolutionary masses in the south of Ukraine was spontaneous and unsystematic, mostly affecting the wealthy, among whom a certain stratum was the Greek entrepreneurs. The latter agreed to “requisitions” and paid some money to “revolutionary dealers”. The period of “red terror” – 1919 – 1921 can be divided into two periods: 1919 – mass terror of socially hostile elements, which took place mostly without investigation and trial in response to the “white terror”, and 1920 – 1921 – systematic and targeted persecution of the “insurgent element”, underground anti-Bolshevik organizations, citizens, who served in non-Soviet armies. The second period, along with the strengthening of the Soviet government, gradually shifted from a form of terror to systemic political repressions.

In the materials of repressive authorities is shown that the majority of the Greek community members managed to avoid persecution for the participation of the Greek army in the intervention of the Entente troops in 1918 – 1919. During the second wave of the “red terror” of 1920 – 1921, the Greeks, like other citizens, were also victims of the Extraordinary Commission and the Revolutionary Tribunals. At the same time, although the Greeks were among the counter-revolutionaries and members of underground organizations, their participation was not massive and did not express the national character of socio-political resistance to the Soviet system.

**Key words:** revolution of 1917 – 1921, the Greeks, Southern Ukraine, Greek emigration, red terror, political repressions.

## ГРЕКИ ПІВНІЧНОГО ПРИЧОРНОМОР'Я В УМОВАХ “ЧЕРВОНОГО ТЕРОРУ” (1919 – 1921)

**Анотація.** Однією з малодосліджених тем є масові репресії більшовиків 1919 – 1921 рр., що отримали усталену назву “Червоний терор”. І якщо окремі епізоди досить добре відомі, то у розрізі репресій щодо національних меншин це питання залишається у колі недосліджених аспектів історичного минуло. **Мета** дослідження полягає у визначенні масштабів репресій щодо грецької меншини Північного Причорномор'я на матеріалах Одеської губернії. **Методологічне підґрунтя** роботи становить позитивістський підхід до реконструкції історичного минулого з використанням спеціально-історичних методів: хронологічного, системного, історико-біографічного та історико-порівняльного, ґрунтуючись на принципах об'єктивності й історизму. **Наукова новизна** статті полягає у реконструкції масштабів більшовицьких репресій щодо грецької національної спільноти на підставі розсекречених матеріалів радянських каральних органів.

**Висновки.** Матеріали свідчать, що у 1917 – 1918 рр. на Півдні України терор революційних мас мав стихійний і несистемний характер, здебільшого стосувався заможних верств, серед якої певний прошарок становили греки-підприємці. Останні погоджувалися на “реквізиції” та відкупувалися від “революційних ділків”. Добу “червоного терору” – 1919 – 1921 рр. можна умовно поділити на два періоди: 1919 р. – масовий терор соціально ворожих елементів, що переважно відбувався без слідства та суду як відповідь на “білий терор”, і 1920 – 1921 рр. – системне та цільове переслідування “повстанського елементу”, підпільних організацій антибільшовицького спрямування, громадян, що перебували на службі у нерадянських арміях. Другий період, разом зі зміцненням становища радянської влади, поступово переходив із форми терору до системних політичних репресій.

Матеріали репресивних органів свідчать, що більшості представників грецької спільноти вдалося уникнути переслідування за участь грецької армії в інтервенції військ Антанти 1918–1919 рр. На другій хвилі “червоного терору” 1920 – 1921 рр. греки, як й інші громадяни, теж ставали жертвами Надзвичайної комісії та Революційних трибуналів. Водночас хоча греки і фігурують у колах контрреволюціонерів та учасників підпільних організацій, але їх участь не була масовою та не виражала національний характер соціально-політичного спротиву радянській системі.

**Ключові слова:** революція 1917 – 1921 рр., греки, Південна Україна, грецька еміграція, червоний терор, політичні репресії.

**The Problem Statement.** In Ukraine the period of national liberation struggle of 1917 – 1921 continues to arouse interest of both professional historians and the public, which is caused by a large number of controversial topics in the vision of the processes that took place during this difficult period. One of such topics is the mass repressions of the Bolsheviks of 1919 – 1921, which received the well-established name “red terror” in the historical literature. If some (high-profile) episodes of these events are well known to a wide range of historians, in terms of repression against national minorities, this issue remains among almost unexplored aspects of the history of this period.

**The Analysis of Recent Researches and Publications.** Repressions during the national liberation struggle and civil confrontation were studied only in fragments. This fragmental analysis was due to both politicization of this issue and limited source base, which in fact was inaccessible to the average researcher due to its specifics (criminal cases, classified funds of state archives, etc.).

For a long time, the only known episode of the repressive apparatus of the All-Ukrainian Emergency Commission (VUCHK), in which the Greeks were mentioned, was “The Case of Seraphidis” (1920). Appearing for the first time in the study of V. Holichenko (Holichenko, 1966, pp. 101–105), it still “roams” from one study to another in fact unchanged.

Isolated fragments of the Bolshevik repression against the Greeks can be found in the latest works by I. Holoborodko, L. Levchenko, Y. Kotlyar, O. Shyshko, O. Trygub, and O. Osypenko. Thus, L. Levchenko (Levchenko, 2019), elucidating the events of the “Ukrainian campaign” of the Greek army in 1918 – 1919, using the cases materials of the repressed Greeks of the city of Mykolaiv in 1937 – 1938, the author mentions the persecution of the Greek community members who collaborated with the Entente army. Instead, in other works (including with Yu. Kotlyar), which are devoted to the period and region under study, the author ignores the Greek issue (Kotlyar & Levchenko, 2019; Levchenko, 2020). O. Shyshko (Shyshko, 2019) mentions some surnames of Odesa Greeks who fell into the grindstone of the “red terror”. I. Goloborodko (Goloborodko, 2005) tried to put in order information about the criminal cases of the repressed Greeks and indicated not only the names but also the essence of the accusation. Briefly O. Trygub and O. Osypenko (Trygub & Osypenko, 2021) made an attempt to describe the Bolshevik repressions in the South of Ukraine against the Greek ethnic group in the context of the history of the Greek diaspora during the revolutionary period of 1917 – 1921.

**The Purpose of the Research.** To outline the scale of repression against the Greek minority on the Northern Black Sea coast based on the materials of Odesa and Mykolaiv provinces. To revive from oblivion the names of the repressed Greeks during the first years of the Soviet rule, to reveal the essence of accusations and their results.

**The Source Base.** The primary sources are the criminal cases of the repressed Greeks in 1919 – 1921, such as: a court case (the materials of Odesa Provincial Revolutionary Tribunal, stored in the State Archives of Odesa region), and an extrajudicial case (the materials of Odesa Provincial Emergency Commission – the CheKa stored in the Sectoral State Archives of the Security Service of Ukraine in Odesa region). Fragments of individual extrajudicial cases were published in the collections “Results and Practice of Annual Activities of Odesa Gubcheka” (Itogi i praktika, 1921) and “Odesa Martyrologist” (Kovalchuk & Razumov, 2005). Materials of the periodical press of Odesa and Mykolaiv are subsidiary, in which we find separate reports about victims of the “red terror”.

**The Results of the Research.** At the beginning of the XXth century the Greeks of the cities of the Northern Black Sea coast were small national colonies with a fairly high standard

of living. For example, in socio-economic terms, there was a significant middle class among the Greek community in Odesa (36% of its economically active population), while wealthy property owners who had income from rent (8,8%), exceeded the city average. At the same time, the percentage of the lower social classes (servants, industrial workers, day laborers and the poor) reached 52% of economically active Greek population, which was a significant marker of the proletarianization of the lower middle class. The main areas of their activity were commerce and banking, manufacturing, household, real estate rent, transport and communications, civil service, etc. (Herlihy, 1989, p. 239).

A significant part of the Greek diaspora were peasants from villages and towns, which surrounded big port cities. Among them there should be singled out such large colonies as Malyi Buyalyk (Ivanovo, Sverdlove), Velykyi Buyalyk (Blahoyevo), Spyrndonivka (Kominternovo, Dobroslav), Oleksandrivka (the territory of Illichivsk / Chornomorsk), Novomyrne, Vynohradivka in Odesa region, Ochakiv and Tylihulo-Berezansky district in Mykolaiv region and the others. The total number of the Greek diaspora in the Northern Black Sea region reached about 35 000 people, formed as a result of migration waves from 1858 to 1918 (Petsalis-Diomidis, 1972, p. 222).

Despite the fact that in general the revolutionary events of the beginning of 1917 were accepted by the Greeks positively, the Bolshevik coup was accepted with caution by many Greeks. In this respect indicative are the words of Leonid Popandopulo, Mykolaiv engineer, who noted later: “...October *coup* (italics is our. – *the author*) I accepted indifferently, neither hostilely nor sympathetically. On the one hand, I thought that this phenomenon was temporary, no longer than 3–4 months – the revolutionary wave will subside and the legal state will be restored without any excesses, and on the other hand, I was little interested in the situation of foreign nationals and was on the sidelines” (SAMR, f. R-5859, d. 2, c. 3887, p. 13).

During the German-Austrian occupation of 1918 the vast majority of the Greeks continued to engage in their current affairs and they even managed to get a good job. The big owners of restaurants and trading business continued to run their businesses (the families: the Inglezis, the Corbetts, Sikilianos, the Kulohlus, Schinas, the Marhelis, the Petrokokinos, Ikonmidas, etc.). Viktor Savchenko, Odesa historian, noted about this time: “Shops and markets were full of products and manufactories, enterprises and offices operated, actors from all over the former empire entertained new citizens of a new state” (Savchenko, 2013, p. 128).

The events of the end of 1918 and the beginning of 1919 in the international arena and in the Ukrainian state led to the end of the short-lived Austro-German occupation. In December of 1918 – January of 1919, the French-Greek troops appeared in the cities of the Northern Black Sea Coast.

The French-Greek expeditionary contingent did not stay in the southern Ukrainian cities for a long time. During the period of March of 1919, N. Hryhoriev occupied the Black Sea cities and approached Odesa. To avoid losses, the Bolsheviks agreed to a civilian and military evacuation from Odesa, which began on April 4 and lasted for 3 days (Petsalis-Diomidis, 1972, pp. 240–241). Despite the short stay of the Entente contingent in the South of Ukraine, later the Chekists used cooperation with the interventionists and accusations of extraditing communists to the voluntary and French authorities to formulate executions during the “red terror”.

Of course, the Greeks were aware of the dangers of their position under the Soviet rule, that is why, they boarded a ship with the Greek military and sailed abroad. This leaving was facilitated by rumors of mass killings by Ataman Hryhoriev’s fighters. After the surrender of Kherson and Mykolaiv, Ivan Bunin wrote in his diary: “Rumors: the French are leaving

Odesa... In Kherson, the Bolsheviks slaughtered up to 200 Greek families. The French do not want to fight. Trenches are being dug around Odesa, sandbags are piled up at the station” (Savchenko, 2013, p. 239). Many Greeks, leaving their real estate, left their homes. 10 – 12 thousand Greeks left Odesa only (Petsalis-Diomidis, 1972, pp. 241).

At the same time, the Greek historian K. Avgitidis clarifies that the number of the Greeks who left Odesa should include those Greeks who gathered in Odesa with the withdrawal of the Greek army from Kherson, Mykolaiv and other cities and parts of Russia. In Odesa the vast majority of the Greeks did not leave the city. He notes another notable feature of emigration – in general the rich Greeks left Odesa and Russia, those who had money, and poor workers remained in Russia. Another reason for the departure of the elite, the historian calls the fear of “retaliation” in general, which was quite justified due to participation in the military campaign. According to the facts, some Greeks fell victim to “anti-Soviet propaganda” and left their homes. Of the total Greek population, only 3% of the Greek population left for Greece. The vast majority refused to leave their homes and remained in “Soviet Russia” (Avgitidis, 1999, pp. 290–291).

The second coming of the Bolsheviks in the Northern Black Sea region (March – August of 1919) was marked by a bloody tragedy, known as the “red terror”, carried out by the “punishing sword of the revolution” – All-Ukrainian Emergency Commission (VUChK) and its local branches. The victims of the “famous” Odesa Provincial Emergency Commission (OGChK) were about 1000 (O. Shyshko), 2000 (V. Savchenko) shot (Shyshko, 2019, p. 116). The number of those tortured in Kherson and Mykolaiv was not estimated so far.

From the current research and available materials, it should be stated that in 1919 – 1921 the Chekists did not carry out repressions on national grounds, but focused on the class issue. However, the Greek community was under a special control of the Bolshevik punitive authorities.

Thus, at the beginning of May of 1919, the Chekists revealed the underground anti-Soviet organization “The Russian People’s State Union”, headed by Ivan Dusinsky, a librarian of Novorossiysk University. The organization was founded by I. Dusinsky on June 25, 1917, as an alternative to the existing parties, in order to unite the state and national interests. A council of three people was at the head of the Union, which included a Greek Spyridon Scarlato, about whom I. Dusinsky noted: “S. N. Scarlato – the second member of the council (the first was me) was always a modest and helpful person, who stood very clearly on the populist platform, restrained and moderate; he was the treasurer of the Union” (SSA SSU, f. 6, d. 6082-п, p. 17).

The history of the organization was set out in detail by its founder I. Dusinsky at the first interrogation in a special department of Army III on May 4, 1919. He insisted that his organization had nothing to do with monarchical circles, but these assurances proved futile (SSA SSU, f. 6, d. 6082-п, pp. 1–42).

The result of this case is set out in the Bolshevik newspaper “Izvestia” of May 16, 1919 (there is no decision in the criminal case), in which, in particular, it was stated: “During the stay of soldiers-volunteers and the Entente in Odesa, this monarchical union cracked down on the working population brutally, serving as a search engine for soldiers-volunteers and relying on the strength of the White Guard bayonets. Dozens of workers and revolutionaries from Odesa and its suburbs were shot and brutally tortured on the instructions of the Union members... The decision of the Military Revolutionary Tribunal sentenced the above-mentioned people to death. The sentence was executed on the night of [May 9]” (Rozkryto

monarkhichnu organizatsiyu, 1919). In September of 1919, all those executed, including S. Scarlato, were buried at the second Christian cemetery in Odesa (Pokhorony zhertv, 1919).

As very few criminal cases of 1919 were preserved, the local press, which openly published the results of the “hard work” of Odesa Cheka, helped to find some names. The same way as monarchists and counter-revolutionaries there were shot Volodymyr Frangopulo, a teacher, and Pavlo Pitaki (Mitaki), a staff captain, a white officer Dionysius Papafanasopulo (with the latter “for hiding a husband” was arrested and his wife – Sophia, but was released) (SAOR, f. R-8065, d. 2, c. 3224, pp. 8–12, 18; Revtribunal, 1919; Chervonyi sud, 1919; Borotba, 1919; Odesskie novosti, 1919). According to “the red terror in response to the white terror” there were shot: a homeowner Ivan Ambatielo, landowners Xenophon Shurmuraki and Petro Dulanaki, Ivan Panayotov (Panayoti) and his son, a student of Novorossiysk University Dmitry Panayotov (Panayoti) (Trygub & Osypenko, 2021, p. 163; Odesskiy listok, 1919a).

Instead, not all arrests ended in capital punishment for the Greeks. Interesting in this context is the fate of the Moldavian prince of Greek origin Dymytri Heorhievykh Mavrokordato (1849 – 1919). The prince began his career in the Navy, and in 1894 he joined the commercial Volunteer Navy, having gone through all the stages of a merchant navy sailor in the company, for which he received universal love among sailors and workers of the Navy. In 1919, when he was arrested and taken to the Cheka, a crowd of workers came to Catherine Square, where the office of Odesa Emergency Commission was located, and insisted on the release of 70-year-old prince. Thus, owing to the support of workers, the prince managed to get rid of Odesa Cheka. Imprisonment in the Chekist cellars probably did not go unnoticed for the elderly prince, because in October of the same year he fell ill and died of “inflammation of the meninges” (meningitis) in four days of illness (Kn. D. G. Mavrokordato, 1919).

A more everyday situation happened to Ivan Kuppe, a well-known Greek businessman and trader of Mykolaiv. On June 11, 1919, he was arrested by Mykolaiv Emergency Commission and taken to Mykolaiv Prison. However, by order of D. Rybak, a new head of Mykolaiv Cheka, on June 14, 1919 he was released. According to the Ukrainian researcher L. Levchenko, the documents show that I. Kuppe agreed to a “tax” (to pay a certain amount of money for his release) and said at what address he would live after his release (Levchenko, 2019, pp. 82–83). Most likely, such cases were not uncommon and many wealthy Greeks in the southern cities, who refused to emigrate, simply redeemed themselves by agreeing to this form of “cooperation” with the Bolsheviks.

At the same time, the Greeks were on a special account of the Bolsheviks, as the latter still well remembered “the Ukrainian campaign” of the Greek army of 1918 – 1919. For this reason, all Greeks were registered, as evidenced by the newspaper announcement of July 4, 1919: “All Greek nationals registered in the Foreign Affairs Department must come to the Department from July 5 to 10 this year... to obtain a residence permit. It is necessary to have a document from the police department in the area where everyone lives” (Izvestiya, 1919). Thus, the Bolsheviks sought to test all Greeks for their loyalty. But despite this prejudice against the Greek community, the latter managed to avoid the expected mass repression in the first wave of “the red terror” of 1919.

In mid-August of 1919, Volunteer Army under command of General Denikin began a rapid offensive on the northern Black Sea coast. On August 13 Kherson was invaded, on August 18 – Mykolaiv, and on August 24 the Bolsheviks left Odesa again. Wealthy citizens welcomed their liberators enthusiastically. Solemn banquets and thanksgiving prayers were held in restaurants and hotels, and the “old order” was restored. On September 26, “the Greek colony” of Odesa,

led by a well-known businessman, publicist and public figure Elefteriy Dmytrovych Pavlidi, organized a solemn meeting of General Anton Denikin, stating, “that they welcome Russia as a second homeland and believe in General Denikin” (Odesskiy listok, 1919c).

Along with the white army, some members of the Greek diaspora began to return to Odesa. The majority of researchers on this issue come to the conclusion that among many reasons for the return, there are the two main ones: 1) unsatisfactory living conditions in the metropolis (the majority of emigrants ended up in unsettled camps for displaced persons) and, 2) the desire of wealthy Greeks to return the property nationalized by the Bolsheviks and receive the promised by the Greek government compensation for requisitions, looting and pogroms (Trygub & Osypenko, 2021, p. 164).

Some Greeks cooperated with the Volunteer Army actively. In 1919, Kateryna Sniezhkova, a Greek from Odesa, housed the Denikin Army Headquarters in her mansion and gave an apartment to Biriukov, a lieutenant colonel of the white army. Heorhiy Surmeli, studying at Mykolaiv gymnasium, accepted the offer of cooperation with the white counterintelligence as a secret employee and received an agent pseudonym “Greek”. Vasyl Kentros, Mykolaiv burgher, became close to the officers with the arrival of Denikin’s army, “often attended banquets and parties arranged by them, I accompanied them when they retreated, I even wanted to evacuate with them, but for reasons beyond my control I was late to board the steamer”. His wife – Paraskoviya Hlibivna, was the member of the Committee for Aid to the White Army, participated in the collection of clothing, linen and money for the benefit of volunteers-soldiers (SAMR, f. R-5859, d. 1, c. 2313, p. 8; Trygub & Osypenko, 2021, p. 165). Later all of them came into the field of view of the All-Ukrainian Emergency Commission.

At the beginning of the 1920s, the Bolsheviks came very close to the southern Ukrainian region. On January 29, 1920 the Red Army occupied Kherson and the next day – Mykolaiv. On February 8, the Red Army occupied Odesa. With the first news of the Bolshevik offensive, a significant number of the Greeks decided to emigrate or at least temporarily move to the Crimea, which was controlled by Wrangel’s army. Noble families, industrial and financial aristocracy, intellectuals, i.e., the most active and educated sections of the Greek diaspora and other national communities usually emigrated. These people ensured the preservation of ethnocultural identity in a non-national environment, being the national elite of the Greek diaspora. Representatives of such famous families as the Arkasas, the Mavrokordatos, the Pavlidis, the Inglezis, the Kurisas, the Petrokokinos, the Popandopulos, the Rodokonakis and the others left the northern Black Sea coast.

The return of the Bolsheviks led to the deployment of the second stage of the “the red terror” (1920 – 1921). Provincial emergency commissions and revolutionary tribunals started to search for counterrevolutionaries with a special zeal. During the year of 1920, 33 Greeks (30 with the Greek citizenship and 3 with the Soviet citizenship) were arrested and convicted by Odesa GubCheka. According to the types of crimes, they were classified into: counterrevolution – 14 (anti-Soviet agitation – 6, possession of weapons – 1, service in the White Army – 4, the others – 3); official crimes – 2 (extortion and blackmail – 1, the others – 1); speculation – 2; non-fulfillment of orders of the Soviet authorities – 8 (concealment of goods from being registered in the report – 4, concealment of bourgeois property – 4); criminal offenses – 7 (thefts – 2, production and sale of counterfeit money – 2, banditry – 1, the others – 2) (Itogi i praktika, 1921, tables 5, 6, diagrams 5a, 6).

As we can see, more than half of them are criminal offenses, mainly of an economic nature. We are interested in political cases in which 14 people were convicted during the

year. In this context, I would like to begin by considering the textbook case, which the Chekists themselves called "one of the brightest cases that passed through the hands of the representative of Group 5" (*Itogi i praktika*, 1921, p. 120), under the name "Little Entente", in which the key figures were the Greeks. The content of the "Little Entente" was as follows.

In mid-May 1920, Odesa Chekists arrested the French intelligence agent Arnold Lelian (Lialian), a member of the White Guard officer group which prepared an uprising in Odesa. In Odesa, he planned to meet with Secretary of the Greek Consulate Panat Serafidis, give him instructions and obtain spy materials for the French intelligence. Serafidis, as the Chekists knew, maintained relations with Denikin's and French intelligence during a foreign intervention in Odesa. A. Lelian testified during interrogations that P. Serafidis collected spy information through the "spy White Guard organization" created by him.

The Chekists introduced their agent to Serafidis' group (later, describing this operation, Odesa Chekists boasted: "In the case of Serafidis and Holiasco, one good Cheka worker managed to penetrate the organization and entirely hand it over to the punishing body of the proletariat" (*Itogi i praktika*, 1921, p. 121)). It turned out that one of Denikin intelligence officers, General Havrilov and Cornet Lopukhovskiy, during the retreat of the Volunteer Army from Odesa, gave Panata Serafidis, Captain Huldinsky and Lieutenant Semen Holiasko, acting as a courier between Admiral Kolchak and General Denikin, the money to organize an underground organization and to form an armed detachment consisting of the white officers. With the return of the Bolsheviks to Odesa at the beginning of the 1920s, Serafidis began extensive work in the Red Army units, in the police, maintaining ties with Wrangel, to whose intelligence he provided detailed information on the plans of the Soviet military command, the deployment and armament of the Red Army units.

The group included Arseniy Kyryliuk, Odesa policeman from Boulevard District of Odesa, Dionis Petrato, a county security officer, Aleksander Kovalevych, a Serbian officer, Leonid Robu, a staff officer, and the others. Serafidis' closest assistants were Semen Holiasko, a former lieutenant in Denikin army, and Nikolai Raftopoulo. In total, the organization consisted of 300 people.

The responsibilities of the key players in "the white underground" were distributed the following way. Policeman A. Kyryliuk undertook to provide the organization with the necessary number of armed policemen at the time of its activities, who were to seize all important institutions during the coup. To ensure the uprising success in the city, the organization decided to contact Odesa bandits and robbers, so that at the time of the coup their robberies and raids had some influence on the power transfer to the rebels. Bandits agreed to take part in the anti-Bolshevik uprising gladly on condition they were guaranteed the opportunity to plunder the city with impunity for 3 days. The underground agreed to their terms. With the consent of the organization, Odesa criminal group introduced its representative Dionis Petrato to Odesa Cheka.

Staff-Captain Leonid Robu, with a sufficient number of people at his disposal, headed the agitation, anti-Bolshevik work among peasants and workers on the outskirts of the city and in the countryside. During his arrest, a large number of documents confirming his active work in this organization were confiscated.

Serbian officer Aleksander Kovalevych founded an armed detachment of officers who arrived to organize the uprising. He was entrusted with the management of military work and, above all, espionage.

Nikolai Raftopoulo, a member of the organization, served as a courier between the organization and the Crimea. During the search, he was found with a report on the organization

activities with detailed plans of the location of the Red Army military units. He was to travel with these plans to the Crimea. The report stated that in the organization there were selected people, officers, cadets and soldiers of the Greek army, who took part in “the Ukrainian campaign”. In the same report it was stated: “one of the best means of disbanding the red rear is to spread various kinds of panic provocative rumors; propaganda among the peasants, who, unfortunately, are not affected by such rumors, because of mistakes the Volunteer Army left bad impressions” (Likvidatsiya, 1920).

In July of 1920, raids and mass arrests were carried out, as a result of which the group headed by Serafadis was liquidated. Chekists confiscated large stocks of weapons, money and uniforms. According to the resolution of the board of Odesa GubCheka of July 12, 1920, Panat Paraskevych Serafadis, Semen Andriyovych Holiasko, Dionisius Marynovych Petrato (Petraکو), Leonid Heorhievych Rob (Nob), Aleksander Nikolayevych Kovalevych (Komachevych), Arseniy Danylovych Kyryliuk, and Nikolay Ivanovych Ravtopulo (Raftopulo) were shot on July 18. He was shot on July 18 (Likvidatsiya, 1920; Itogi i praktika, 1921, pp. 117–121; Golinkov, 1975, pp. 417–418). It is possible that more people were involved in the case, among whom there could be some Greek soldiers who under different circumstances (captured, sick, wounded) did not have time to evacuate (in November of 1919 it was written about this situation in the newspaper “Odesa Leaf”) (Odesskiy listok, 1919b)).

On April 17, 1920, a XIV special unit of the Soviet Red Army arrested Ivan Pavlovych Kavura, a Greek citizen, a clerk of the Black Sea Coast Technical Defense Headquarters in Odesa. He was accused of “an active participation as an employee” in the work of “the French voluntary counterintelligence... heading the raids and document checks” (Kovalchuk & Razumov, 2005, p. 385). During interrogations, I. Kavura confirmed that he had served in the Combined Volunteer Regiment 2, but as a soldier and had nothing to do with counterintelligence. Despite the fact that the guilt of the arrested person was not proved, on June 9, 1920, the board of Odesa GubCheKa decided to imprison I. Kavura in a concentration camp for 2 years. His further fate is unknown (SSA-SSU, f. 6, d. 27210-п, pp. 1–21; Kovalchuk & Razumov, 2005, pp. 385–387).

In August of 1920, “for participating in the counter-revolutionary uprising of 1919” there were arrested wealthy peasants of the village of Kapakliyevka, Kurtov volost, Odesa district, among whom were the Greek settlers: Nikolai Stepanovych Kapakli, Ivan Lefterovych Kapakli and Stepan Khristoforovych Muyaki (SAOR, f. R-1774, d. 1, c. 89, pp. 1–2; c. 118, pp. 1–9; c. 127, pp. 1–15). The first was sentenced to 5 years in a concentration camp (later replaced by 2 years), and the fate of the other two cannot be traced according to the Revolutionary Tribunal’s case.

In October of 1920, a former Volunteer Army officer Nikolai Andriadi was arrested. During interrogation, he noted that he “works in a volunteer organization” called “Counterintelligence Department at the Headquarters of Corps 2 of General Slashchov’s Army”. The organization maintained ties with the Crimea, where Baron Wrangel’s army was stationed at that time, and with the Polish military intelligence. The main task of the organization was to get information about the activities of the Red Army and the defense of Odesa. A total of 193 people were arrested in the case, of whom 80 people were released, 15 people received various terms of imprisonment, and 98 people were shot (Itogi i praktika, 1921, pp. 92–94). The fate of N. Andriadi is unknown.

In October of 1921, in the town of Berezivka in Odesa province, another underground group led by Lieutenant Poliakov was exposed, which was renamed “Berezivka Officer-Kulak

Organization”. Its participants were also representatives of the Greek diaspora: Mykhailo Mykhailovych Feokharadi (Feokhari), Vasyl Mykhailovych Anhelov and his children – Victor, Anatoliy, Maria and Claudia. A total of 30 people were on trial (V. M. Anhelov is not on the list of those arrested). On November 19, 1921, by the Resolution of the Grand Collegium of Odesa Provincial CheKa 19 were sentenced to execution with full confiscation of property “for participation in the preparation of a counter-revolutionary conspiracy”, and 4 people – up to 5 years in concentration camps. M. M. Feokharadi was executed, and the Angelovs family was released from prison (SSA SSU, f. 6, d. 27250-п, pp. 1–559; Goloborodko, 2005, pp. 102–103).

**The Conclusions.** Based on the available material, we see that “the red terror” in the Bolshevik-controlled territories was caused by a number of factors. There were key factors among them: the desire to retain power, which was to be based on class hatred of “the bourgeoisie and capitalists”, and the policy of mass terror paralyzed any resistance among all strata who may be dissatisfied with the Bolshevik order: from workers and peasants to landlords and nobles.

To carry out political terror, special punitive bodies were formed – emergency commissions and revolutionary tribunals. The materials show that in 1917–1918 the terror of the revolutionary masses in the south of Ukraine was spontaneous and unsystematic, mostly affecting the wealthy, among whom a certain stratum was occupied by the Greek entrepreneurs. The latter agreed to “requisitions” and paid some money to “revolutionary dealers”.

The period of “the red terror” – 1919 – 1921 can be subdivided into two periods: 1919 – mass terror of socially hostile elements, which took place mostly without investigation and trial in response to “the white terror”, and the period of 1920 – 1921 – a systematic and targeted persecution of “the insurgent element”, underground anti-Bolshevik organizations, citizens who served in the non-Soviet armies. The second period, along with the strengthening of the Soviet government, gradually shifted from a form of terror to a systemic political repression.

Materials from the repressive authorities show that the majority of members of the Greek community managed to avoid persecution for the participation of the Greek army in the intervention of the Entente troops in 1918 – 1919. This was facilitated by the mass emigration of wealthy sections of the Greek diaspora to Greece on the eve of the arrival of the Bolsheviks, which saved them from the uncontrollable repression flywheel during the first period of “the red terror”. Small remnants of those who sympathized with the anti-Bolshevik ideas left southern Ukrainian cities during the emigration wave at the beginning of the 1920s.

During the second wave of “the red terror” of 1920 – 1921, the Greeks, like other citizens, also fell victim to the Extraordinary Commission and the Revolutionary Tribunals. At the same time, although the Greeks were among the counter-revolutionaries and members of underground organizations, their participation was not massive and did not express the national character of socio-political resistance to the Soviet system.

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## ATTEMPTS TO ORGANIZE OIL INDUSTRY IN INTERWAR POLAND

**Abstract.** *The purpose of the study is to highlight the attempts of the entire oil industry of interwar Poland to unite in order to overcome mutual competition and achieve greater economic success. The methodology of the study is based on the principles of historicism, logic, scientific objectivity in assessing the past, a critical attitude to existing sources, including laws, which regulated the oil industry of interwar Poland, minutes of meetings of oil companies and societies, articles in specialized journals, etc. General scientific (analysis, analogy, synthesis, generalization), special and historical methods (historical and genetic, historical and typological, historical and systemic, comparative and historical) were used. The scientific novelty consists in the issue of the oil industry organization in interwar Poland, which significantly influenced the development of this industry, has not been the subject of a separate study. This issue was analyzed only causally describing the situation in the oil industry of Galicia in general. The Conclusion. The issue of the oil industry organization was important for the development of this industry in interwar Poland. At that time, crude oil production decreased significantly. Although the majority of the oil industry continued to be owned by foreigners, however, the Germans and the Austrians were largely replaced by the French. The Polish citizens owned mainly small and medium enterprises, the Polish state owned the biggest oil refinery in Drohobych. The task of the oil industry and the government was to organize various groups of entrepreneurs in this industry. But it was impossible to unite the entire oil industry. This unification was hampered by disputes among individual foreign firms, among foreign and local entrepreneurs, and etc. Nowadays, attempts to achieve such unification of the entire oil industry can be a good example of what mistakes should not be made for a proper unification in order to develop the industry by the government and entrepreneurs.*

**Key words:** *Galicia, syndicate, cartel, “pure producers”, oil industry, interwar Poland.*

## СПРОБИ ОРГАНІЗАЦІЇ НАФТОВОЇ ПРОМИСЛОВОСТІ У МІЖВОЄННІЙ ПОЛЬЩІ

**Анотація.** *Мета дослідження – висвітлити спроби усієї нафтової промисловості міжвоєнної Польщі об'єднатися з метою подолати взаємну конкуренцію й досягнути більших*

господарських успіхів. **Методологія дослідження** ґрунтується на принципах історизму, логічності, наукової об'єктивності в оцінках минулого, критичного ставлення до наявних джерел, зокрема, законів, які регулювали нафтову промисловість міжвоєнної Польщі, протоколів засідань нафтових підприємств і товариств, статей у профільних часописах тощо. Використовувалися загальнонаукові (аналізу, аналогії, синтезу, узагальнення) й спеціально-історичні методи (історико-генетичний, історико-типологічний, історико-системний, порівняльно-історичний). **Наукова новизна статті** полягає у тому, що питання організації нафтової промисловості у міжвоєнній Польщі, які істотно впливали на розвиток цієї галузі, не стали об'єктом окремо дослідження. Цю проблему розглядали лише причинково, в загальному описуючи стан нафтової промисловості Галичини. **Висновки.** Питання організації нафтової промисловості було важливим для розвитку цієї галузі в міжвоєнній Польщі. В цей час істотно зменшилося видобування нафти-сирицю. Хоч більшістю підприємств нафтової промисловості продовжували володіти чужоземці, однак німців й австрійців змінили здебільшого французи. Грамадяни Польщі утримували головно малі й середні підприємства, у власності польської держави був найбільший нафтопереробний завод у Дрогобичі. Завданням нафтової промисловості й уряду було належно організувати різні групи підприємств галузі. Об'єднати всю нафтову промисловість так і не вдалося. Цьому на заводі стали суперечки між окремими чужоземними фірмами, між чужоземними й місцевими підприємцями тощо. Спроби досягти такої організації цілої нафтової промисловості можуть бути нині добрим прикладом, яких помилок не варто допускати владі й підприємцям для належного об'єднання заради розвитку галузі.

**Ключові слова:** Галичина, синдикат, картель, "чисті виробники", нафтова промисловість, міжвоєнна Польща.

**The Problem Statement and Topicality.** Energy independence is one of the important components of the state economic success. That is why, all countries always try to provide themselves with energy resources, among which the most important (especially during the period between the two world wars) is oil. For interwar Poland, solving this problem was complicated by a significant reduction in crude oil production and, consequently, the production of petroleum products. In addition, the structure of the industry changed significantly. Later, it was dominated by foreign capital, and the Poles owned small and medium enterprises mostly. However, the German and Austrian ownership in the Galician oil industry was taken over by the French largely. It was important for the Polish government to ensure the development of the oil industry, taking into account the probability of a new war, the development of motorization, maintaining a positive trade balance and the need to provide raw materials to numerous refineries. To this end, governments tried to organize diverse enterprises in the industry to avoid undesirable competition in the oil market. Coverage of the attempts to create institutions aimed at combining different types of production activities, national origins of capital and production volumes of enterprise can be useful for modern organization practice of the oil industry. At the same time, in current oil policy of the state there should be taken into account numerous mistakes that accompanied the attempts to unite enterprises of the oil industry during the interwar period. It was the mistakes which hampered the development of the oil industry, accelerated its decline, and as a result led to a decline in the industrial potential of Galicia.

**The Analysis of Sources and Recent Researches.** The basis of the article source base are publications in specialized journals of the interwar period: "The Mining and Metallurgical Magazine" (in Polish – "Czasopismo górniczo-hutnicze"), "The Oil" (in Polish – "Nafta"), "The Oil Industry" (in Polish – "Przemysł naftowy"). Some materials of the Central State Historical Archive in Lviv from the funds of various institutions of the oil industry were also used.

Until nowadays, in historiography there has not been specifically studied the organization of the oil industry in interwar Poland. The question of the development of this industry was mostly causally mentioned in general works on economic history. Not so many researches focus on the oil industry. In 1972, the research of Jan Cząstka (Cząstka, 1972) was published in Kraków, in which there was analyzed the development of the oil industry in Poland briefly. This issue is analyzed in the History of the Polish Oil Industry in more detail, which was published in two volumes in 1994 – 1995. In Volume 1 there were analyzed the industry foundation and technical issues of oil production and refining of crude oil, briefly there were described the activities of major enterprises. In Volume 2 there were analyzed the development of the gas industry, and the organization of the oil industry, research and education, patriotic and social activities of oil workers (Historia..., 1994 – 1995). Some issues of this problem were analyzed in a special collection of articles published in Toruń in 2014 (Historia..., 2014). However, little is mentioned about the organization of the oil industry in these studies. Some researchers analyzed the oil industry in Galicia: Stanislav and Kristina Volkovichi, Marek Granichny and Halyna Urban (History..., 2017), Alison Frank (Frank, 2005; 2011) Volodymyr Klapchuk (Klapchuk, 2013a), Wojciech Morawski (Morawski, 2017) and Oksana Pasitska (Pasitska, 2019). Special publications were written on oil production by S. Wołkowicz (Wołkowicz, 2019), V. Klapchuk (Klapchuk, 2013b), Mariusz Majewski (Majewski, 2009), Roman Masyk (Masyk, 2017b). R. Masyk studied oil refining in Eastern Galicia (Masyk, 2017a). The change of ownership in the Polish oil industry after World War I was written by Norman Davies (Davies, 1970) and Piotr Franaszek (Franaszek, 1986). Vladyslava Moskalets analysed some issues in the history of the oil industry in Galicia (Moskalets, 2014; 2019).

**The Purpose of the Research.** Having analyzed the historiographical achievements, source materials – publications in specialized periodicals of the oil industry of the interwar period, as well as unpublished documents of oil institutions to elucidate the attempts to organize this industry in interwar Poland; to highlight the problems that did not allow all oil entrepreneurs to unite completely.

**The Results of the Research.** The oil industry was very important for the economy of interwar Poland and taking into consideration the international trade, and the need to have own oil products in case of a new war (Central State Historical Archive of Ukraine in Lviv, f. 207, d. 1, c. 70, p. 9; c. 166; p. 1; c. 178, p. 6; Kozicki, 1933). All European countries tried to provide themselves with oil products. To this end, much was invested in the search of brine and the construction of new refineries (Wachtel, 1933, pp. 13–14). In interwar Poland, all oil deposits were located in the south of the state at the foot of the Carpathians, from Liman County in Kraków Voivodeship to the border with Romania in the east. Oil refineries were mostly located near the fields, close to Boryslav, Drohobych, etc. (Gaj, 1939, p. 3; Kozicki, 1933, pp. 117–118).

The traditional division into groups of the oil industry (production, refining and trade) was not typical of interwar Poland. In this case it is more expedient to use other classification. In interwar Poland oil producers were divided into three groups: pure brine producers; entrepreneurs who produced and refined crude oil (producers-refineries); enterprises that only processed it (pure refineries). Pure producers were mostly small enterprises founded on the basis of the Polish capital. Their share in the oil industry was about 30%; they owned almost 50% of all oil wells (Szlemiński, 1933a, pp. 91–92).

Refinery firms were mainly foreign-owned and dominated oil production. They owned more than half of all wells in Poland and extracted about 2/3 of brine; except for the state-

owned plant in Drohobych, all major refineries. Pure refineries included the state oil refinery in Drohobych and numerous small enterprises. Small refineries were based mainly on the Polish capital and were less well equipped technically (Sprawozdanie..., 1925, p. 118; Wachtel, 1933, pp. 19–20).

After the end of World War I, the oil industry in Galicia underwent significant changes and new problems appeared. Foreigners continued to dominate the industry. Initially, the Polish government occupied enterprises which belonged to the Austrians and the Germans (3/4 of all enterprises). Later they were bought out mainly by the French banks. Thus, in the oil industry of Galicia the Austrians and the Germans were replaced by the French (Chabrzyk, 1995, p. 134; Cząstka, 1972, p. 23; Franaszek, 1986, pp. 229–243). As a result, by the mid-1920s, more than 80% of the Polish oil industry was owned by foreigners. At the same time, the French owned more than 50% of the industry (Chabrzyk, 1995, p. 135).

During the interwar period, crude oil production decreased significantly (Table 1).

Crude oil production decreased or stabilized at a very low level from year to year. The amount of brine extracted in Poland was insufficient to ensure the production capacity of the country's refineries. It was dangerous to allow the export of brine, because it could undermine Poland's self-sufficiency in oil products and pose a threat in case of a possible new war. Because of this, it was necessary to find new methods of searching for brine, deposits outside Boryslav. At the same time, it was necessary to support pure brine producers and not to forget about the state oil refinery in Drohobych and small plants, as they were owned by the Polish citizens. Forgetting to support them, the Polish government risked the oil industry to be completely taken over by foreigners (Morawski, 2017, pp. 21–22).

The lack of a sufficient number of brine and differences in financing and tasks of the oil industry necessitated the organization of the industry. The best solution was to organize everyone who worked in the oil industry. This could not be achieved, which provoked a confrontation between pure producers and refineries, large and small refineries.

The National Petroleum Society was the only platform for some negotiations of the entire oil industry. It was founded in 1877 and during the Austrian rule this institution managed to unite the majority of entrepreneurs in the oil industry. However, during the interwar period the National Petroleum Society remained a public organization and could not properly protect the financial interests of all groups in the industry (Kachlik, 1995, pp. 165–168).

The need for cooperation of all those who worked in the oil industry was discussed many times among the Polish oil industry men. For its development it was necessary to find the

Table 1  
**Crude oil production in interwar Poland according to the Main Statistical Office (Główny Urząd Statystyczny; in tons)**

Year	Crude oil extracted
1913	1,113.668
1919	831.700
1920	765.024
1921	704.874
1922	713.103
1923	737.181
1924	770.792
1925	811.930
1926	796.082
1927	722.596
1928	742.896
1929	674.689
1930	662.763
1931	630.480
1932	556.686
1933	550.673
1934	529.207
1935	514.763
1936	510.630
1937	501.301
1938	nearly 507.000

*Based on (Masyk, 2017b, p. 791).*

ways for mutual understanding among enterprises owned by the citizens of interwar Poland, and companies owned by major global concerns.

The first projects to organize the entire oil industry in Galicia appeared in mid-1919. They were initiated by the National Petroleum Society. Thus, on June 18, 1919, a special commission was formed in the bosom of the Society, which was to conclude a project of such organization. The members of commission took as a basis the proposals suggested to the Austrian government before the war. The main principle was to keep the production of crude oil in order not to stop the process. The distribution of brine among refineries according to their production capacity was considered important. At that time, there was a problem connected with brine which was accumulated at warehouses during the Polish-Ukrainian war. Refineries did not intend to buy it, waiting for the price of raw materials to fall, and the state-owned plant in Drohobych could not process it all. Under such circumstances, the oil industry offered the government to boost the export of brine, but the government did not agree to it. This fact caused large surpluses of raw materials in warehouses, its producers could not take advantage of high profit in foreign markets and often simply burned expensive brine. The project of the National Petroleum Society also provided for the organization of refineries. The organization was to be based on the forced union of all enterprises. Domestic trade in petroleum products was to be conducted by a refinery organization that, in agreement with the government, would cover all domestic demand for petroleum products. Exports of petroleum products were to remain with the government. At the same time, the state oil refinery in Drohobych was given priority in processing brine for export. To organize exports, the government proposed to found a separate institution that would conduct specific transactions. On September 29, 1919, a delegation of the National Petroleum Society went to Warsaw and proposed these decisions to the government. However, such project of organizing the oil industry was not implemented (*Organizacja...*, 1919; *Sprawy...*, 1919).

At the same time, there was suggested a more radical solution to the organization of the industry. For example, in 1919 a joint-stock company the Polish Oil was established in Warsaw, which advocated the nationalization of the Polish oil industry. The institution established a branch in Lviv and planned to establish similar ones in Boryslav and Krosno (*Wiadomości...*, 1919). The Polish government did not follow the path of the oil industry nationalization and allowed both the Polish and foreign entrepreneurs to invest in this industry on equal terms.

In order to organize the entire oil industry, various industry groups had to unite themselves at first. Pure producers were the first ones who tried to unite immediately after the Poles captured Boryslav field. In May of 1919, the Union of Brine Producers (in Polish – *Związek producentów ropy*) advocated the unification of all crude oil production in order to distribute it among refineries rationally, which stopped operating under the rule of the Western Ukrainian People's Republic (ZUNR). At the same time, the government had to control the brine prices, because its appearance in free market would cause prices to fall and cause many wells to stop operating. At that time Warsaw was proposed to be the center of the institution (*Powszechna...*, 1919).

The organization of pure producers gained real shape at the end of 1919 – the beginning of 1920, when on the initiative of Władysław Shaynok there was formed the Union of Polish Oil Producers (in Polish – *Związek Polskich Przemysłowców Naftowych*) in Lviv. The Union was to represent the interests of all medium and small oil plants founded by the Polish citizens. These plants could not defend themselves against the influx of foreign enterprises

with huge capital and government support. In order to influence the state oil policy somehow, they needed to unite. Otherwise, there was a threat that foreigners would completely take over the industry (20 lat..., 1939, p. 123; CSHAUL, f. 219, d. 1, c. 186, pp. 1, 6; c. 299, p. 58).

At the very beginning, the Union of Polish Oil Producers worked as a society, but on October 29, 1920, a law on cooperatives was passed in Poland. The Union, by the way, was engaged in commercial activities, that is why, it had to be reorganized into a joint-stock union. On March 28, 1923, the Union, in accordance with the changes in legislation, was transformed into a cooperative with a limited liability (Walne..., 1923, p. 41; Związek..., 1923, p. 52).

The activities of this institution can be divided into two stages. The first lasted from its founding until 1929. In the first decade of its activity, the Union set itself many tasks. It not only operated as a cooperative, but it was also an oil society – it represented the Polish small and medium enterprises among the authorities, tried to influence oil policy (20 lat..., 1939, p. 124).

Gradually, as a cooperative, the Union became a representative body of pure brine producers. Organizational matters had to be separated from money (loans, etc.). It was decided that the old organization should deal only with financial matters. Instead, there was the necessity to create a new institution that would control the most important common affairs of pure producers. Formally, the reorganization of the institution took place at the end of the summer of 1929. (20 lat..., 1939, p. 126).

To preserve the continuity of the new organization from the cooperative, its name was preserved – the Union of Polish Oil Producers. At the same time, the cooperative continued to operate with the same name. As a result of the division of competencies, conditions were created when all pure mining enterprises could join the Union (society). Therefore, this organization managed to become the center of this group of the oil industry, to unite entrepreneurs with the same interests. Since then, the activities of the Union (society) had not been combined with a cooperative, which was engaged only in monetary affairs (20 lat..., 1939, p. 127; Statut..., 1929; Statut..., 1930; Zmiany..., 1929).

In 1932, instead of the cooperative, the Union of Polish Oil Producers organized the Syndicate of Brine Producers (in Polish – Syndykat Producentów Ropy). It dealt with trade of pure producers (20 lat..., 1939, p. 132).

In the second half of 1934, pure brine producers were reorganized again. There were talks of merging into one institution. On June 2, 1935, a meeting of the Union of Polish Oil Producers took place in Drohobych. Since then, the only institution representing the interests of pure producers had reopened (Zasadnicze..., 1935, pp. 21–23).

It was important for the Union to influence the state oil policy. Otherwise, large refineries, which were mostly global concerns, could take over small, pure producers. The most important tasks of the Union were: to organize the entire oil industry of Poland; to form such prices for brine, which would ensure the profitability of its production; to develop oil drilling, mainly pioneering. Gradually the Union became a solid organization of pure brine producers, becoming the most powerful representative of the Polish property in the oil industry. From 1934 it was represented in the economic self-government (20 lat..., 1939, p. 134).

In interwar Poland the first mergers of large oil refineries (including “pure” refineries and refineries-producers) arose during the recovery of the industry from the effects of World War I and the Polish-Ukrainian War. Private refineries were not destroyed after ousting of the former owners (mainly the Austrians and the Germans), but were in decline due to shutdowns. The Polish government abandoned the idea of the state monopoly on crude oil refining and was forced to attract foreign capital because the Polish business was unable to finance big

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refineries (Przegląd..., 1919, p. 92; Szaynok, 1925c, pp. 85–88; Szaynok, 1929, pp. 22–25). As a result, the Polish entrepreneurs invested only in oil production and small refineries.

In 1919, the government began to create the first cartels of refineries and at the same time increase the number of foreign firms in the industry. According to the Polish oil producers, this was a defining mistake in the governmental oil policy. In some period of time, the cartel began to influence the government, which had no its own vision of the industry (Państwo..., 1924, p. 4). At the same time, foreigners, who, with the assistance of the government after the war, significantly reduced their role in the large-scale production of oil and petroleum products of the Polish capital, ceased to reckon with other groups in the industry. Therefore, the first associations of refineries could not contribute to the development of the oil industry (Wojciechowski, 1933, p. 210).

As early as the end of 1918, the “Polraf” Bureau of Polish Refineries was established in Kraków (in Polish – Biuro Polskich Rafinerów Nafty “Polraf”). Enterprises from Western Galicia took part in it, as Boryslav deposit was controlled by the Western Ukrainian People’s Republic at that time. Then this institution moved to Warsaw (Kachlik, 1995, pp. 168–169). With the capture of Boryslav, the refineries began to talk about reorganizing of their union. Finally, in November of 1919, the Syndicate of the Polish Oil Industry was formed under the name the Polish Oil “Polnaft” (in Polish – “Polnaft”). It was joined by the state oil refinery in Drohobych, which was supposed to be a regulator of relations in the industry. Mainly, the syndicate began to chase after export earnings (Z przemysłu..., 1919, pp. 258–259).

After the abolition of the sequestration of petroleum products in 1921, in order to organize the sale and even distribution of oil throughout the country, a trading company “Kraionafta” was established (in Polish – “Kraionafta”). This organization determined the contingents of production for each refinery, then sold them, monopolizing the price. It, for example, managed to concentrate domestic sales of paraffin. At the end of 1922, this organization was liquidated because the State Oil Refinery in Drohobych left it. Since then, fierce competition between refineries had begun. Oil prices fell, and there were problems in the markets. The disorganization of the Polish exports led to the fact that the Polish oil products were paid 30% less in Europe than the US oil products (Sprawozdanie..., 1925, p. 123; Sprawozdanie..., 1927, pp. 95–96; Szaynok, 1923, pp. 51–52).

The first cartels were particularly sharply criticized by the Polish oil entrepreneurs. For example, the Union of Polish Oil Producers believed that all these organizations wanted to make state-owned oil refineries dependent. Having thus lost a competitor, the cartels sought to take over the entire oil industry. Foreign industrialists tried to influence the government in every possible way. For the most part, they saw Poland as a market for petroleum products, rather than as a country in which large sums of money could be invested in the oil industry. This was primarily due to the extremely high cost of extracting brine there. The Polish government made it clear to foreign entrepreneurs that it would use all means to support its country oil independence. However, some goals foreign capital managed to achieve (Kachlik, 1995, p. 169; Szaynok, 1922, p. 36). The government controlled private industry, but “the Kraionafta” cartel, for example, dictated the price of oil to Drohobych State Oil Refinery and paid for its products later as compared to private firms. During hyperinflation, this caused significant losses to the state-owned enterprise (Nowa..., 1924, pp. 173–174; Szaynok, 1922, p. 37; Z historii..., 1922, pp. 21–24).

Eventually, conflicts between foreign and state-owned refineries led to the liquidation of “the Kraionafta” at the end of 1922. Immediately after the liquidation, the creation of a

new cartel was discussed. The Union of Polish Oil Producers was strongly opposed to this, fearing an increase in foreign ownership in the industry. Pure producers offered to start the state-owned enterprise in Drohobych, which could process up to 40% of all brine produced in Poland in 1923. Instead, this enterprise processed only a quarter. In this way there should be increased the role of the Polish capital in the oil industry (Nowa..., 1924, pp. 174–175; *Przeciw...*, 1923, pp. 145–147).

The government took a different path and supported foreigners and on December 1, 1924 created a trade organization – Economic Association of Refineries (in Polish – *Zjednoczenie gospodarcze rafinerij olejów mineralnych*) in Warsaw (*Sprawozdanie...*, 1925, pp. 123–124; Szaynok, 1925a, p. 3). This organization was also weak and could not solve the problems of the industry. Many refineries immediately stated that they would not comply with the cartel harsh conditions (Szaynok, 1925a, p. 5). The government forced the state-owned enterprise in Drohobych to join the Economic Association of Refineries, which again found itself in a similar non-profitable position as in previous cartels. In fact, acting this way, the state supported foreign property in the industry, which infuriated the Polish oil producers. Especially since refineries began to bring down the price of brine deliberately (Szaynok, 1925b, p. 50; Szaynok, 1925d, pp. 68–69; Szczepanowski, 1925, p. 98).

The Economic Association of Refineries did not fulfill any task that could prove the feasibility of its functioning in practice; none of the promises made to the government and society. It did not contribute to the modernization of refineries. All refineries competed with each other. The cartel did not resolve the issue of a large number of refineries, which significantly increased production costs in petroleum production. Brine production covered the production capacity of operating refineries by only 60%. Another problem of the Economic Association of Refineries was the rivalry of refineries for the domestic market. They overdeveloped their trade organizations in different parts of the country. In addition, there were some trade companies that did not participate in the production and processing of brine. It was necessary to reduce the number of such organizations to reduce trade costs, but oil companies did not agree to this case. The cartel was to free Poland from fierce competition and provide consumers with a good product at an affordable price. Instead, oil prices rose significantly (Kielski, 1927, pp. 59, 113–115, 142, 230–231; *Sprawozdanie...*, 1927, pp. 95–96; Wojciechowski, 1926, p. 18).

The cartel also promised to support oil production. High prices for petroleum products were to increase the price of brine, which in turn would increase drilling. When the Economic Association of Refineries was founded, the refineries promised to increase the price of Boryslav brine to \$ 200 per ten-ton carriage. This increase would correspond to the world cost of such brine. However, these promises were not kept. At the beginning of 1926, Boryslav brine cost only \$ 135–160. By raising oil prices, the cartel simultaneously neglected the interests of crude oil production, and actually the government stayed away from these problems in the mid-1920s. (Wojciechowski, 1926, p. 19). The cartel planned to set up a joint bureau for the purchase of raw materials, but refineries did not agree on the maximum and minimum contingents for its processing. At the end of 1926 the situation deteriorated, when the production of crude oil decreased every month in Boryslav (Kielski, 1927, pp. 368–370, 390–392).

The cartel did not organize the export of petroleum products either, which was the main condition set by the government. It was only managed to reach an agreement with another major European producer of paraffin – Scotland (Kielski, 1927, pp. 259, 296–297; Wojciechowski, 1926, p. 19). Agreements on a single export of other petroleum products

were not successful. This happened because the Polish oil industry already became completely dependent on the policies of two major global concerns – “Standard” (“Standard Oil Company”) and “Shell” (“Shell Oil Company”). The concerns constantly competed for world markets, that is why, no agreement was reached between their Polish offices (Kielski, 1927, pp. 58–59; Wojciechowski, 1926, p. 20).

The Economic Association of Refineries operated until December 31, 1926. After that, competition among them intensified (Dr. S. S., 1930, p. 108; Szydłowski, 1930, p. 75). Therefore, on January 1, 1927, negotiations began on establishing a new organization. The unresolved issues quickly hindered its establishment: there was not enough brine for the Polish refineries; not enough domestic consumption, even for small Polish processing; too extensive trade organizations for a weak internal market; large and expensive export apparatus. The Polish oil industry needed an organization that would: strengthen domestic consumption, without which no production had a sound basis; eliminated the fierce competition of the Polish companies in foreign markets; made it possible to keep the price of brine at a level that would at least slightly support drilling. The Polish government began to emphasize the importance of oil production (Kielski, 1927, pp. 479–480, 502–503).

The government tried to solve all these problems, and in November of 1927 the trade organization Syndicate of the Oil Industry was founded (in Polish – *Syndykat przemysłu naftowego*). It included almost all major oil producers. The government allowed Drohobych state-owned refinery to join the organization (*Sprawozdanie...*, 1929, p. 110). The Syndicate was to operate until April 30, 1933 (Szydłowski, 1930, p. 75). The cartel was organized with the participation of the government, including the Minister of Industry and Trade, who agreed to join the state-owned refinery under certain conditions. They intended to streamline the domestic market; to increase domestic consumption; cooperation in the export market; to use the part of income received from market regulation for operational tasks (Dr. S. S., 1930, p. 108).

The Syndicate continued the policy of production contingents. During the year, centralized organizations were set up to supply the Syndicate refineries with crude oil and joint whole sales (*Sprawozdanie...*, 1930a, pp. 49–50). A brine purchase Center was established. The company “Vacuum” was entrusted to manage it. This company bought brine in the free market and distributed it according to a special key among oil refineries. Also, refinery producers, after fulfilling their contingent determined by the agreement, had to give the excess brine from their wells to the purchase Center. The Syndicate companies could not buy and sell brine on their own (Szczepanowski, 1928, p. 48).

The Syndicate managed to centralize domestic sales of petroleum products, determined prices and terms of sale for all final products in a way motivated by the cost of refining and market relations. The agreement that gave the Syndicate the central sale of most petroleum products was signed on August 18, 1928. The prices of brine and final products stabilized favourably for the oil industry. The joint organization of wholesale covered all the most important products. Gasoline, oil and gas were sold by the central sales office; paraffin both in wholesale and retail in the domestic market and for export at the paraffin department of the Syndicate. Lubricating oils, due to their differences, were sold separately by companies (Dr. S. S., 1930, pp. 109–110; Szydłowski, 1930, p. 76; Wygard, 1928, pp. 425–426).

In 1929 exports were centralized in the Joint Export Bureau (in Polish – *Wspólne Biuro Eksportowe*). It included the three largest companies – the State Oil Refinery in Drohobych, “Małopolska” and “Limanowa”, whose share in exports was 80% (*Sprawozdanie...*, 1930b, p. 58). However, the expected changes in the organization of exports did not happen. Paraffin

was the only oil product when the Polish companies abroad acted as one front was Paraffin (Dr. S. S., 1930, pp. 110–111; Szlemiński, 1930, p. 2; Szydłowski, 1930, p. 77).

During the absence of credits, the oil industry was able to become financially self-sufficient owing to unification. However, the funds were not enough, that is why, investments were made in the most basic needs (Sprawozdanie..., 1930b, p. 60) during the period of 1927 – 1932. The Syndicate somewhat stabilized relations in the industry. The price of Boryslav crude oil remained at more than PLN 1 700, reaching almost PLN 1 900 during the period of conjuncture (Sprawozdanie..., 1934, p. 108).

The Syndicate was to support oil production actively. In 1928 the “Pioneer” Union was created by the Syndicate for this purpose (in Polish – “Pionier”) (CSHAUL, f. 207, d. 1, c. 319, p. 8; Sprawozdanie..., 1934, pp. 110–111). This Union was allocated large sums of money for research work, but it did not achieve high results (Wojciechowski, 1929, p. 35). One of the reasons for “Pioneer’s” failures was that it was run by people from the cartel who were not very interested in the development of oil production. For example, pure producers believed that the money for such work would be worth giving them (Szlemiński, 1930, p. 3).

Despite some achievements, the Syndicate did not become a normal understanding for the entire Polish oil industry, but rather a price bureau. A quarter of the oil industry was outside the Syndicate (Kartel..., 1929). It did not fully take into account the interests of other groups in the oil industry, which contributed to its conflicts with pure clean producers (Szlemiński, 1930, pp. 8–9). Then small refineries came into play. They tried to exploit misunderstandings between pure producers and the Syndicate refineries. Small refineries launched their work fully. They did not participate in scarce exports and worked only for the domestic market. Small refineries offered pure producers a higher brine price. Then the Syndicate companies, in order to reduce the brine price, entered into negotiations with small and medium-sized refineries, so that for compensation they would stop their enterprises operating (Rosenberg, 1929, p. 174; Szlemiński, 1930, pp. 5–6). Such negotiations were successful sometimes (Wiadomości, 1930, p. 98). This success affected the production of crude oil significantly. The biggest problem arose with special brands of brine, which only small refineries agreed to process (J. S., 1929, p. 179). Such activities of the Syndicate were constantly opposed by pure producers, fearing the loss of their brine buyer (Zjazd..., 1929, pp. 179–180).

The crisis that prevailed in the world at the end of 1920s and at the beginning of 1930s also affected the oil refining industry. Prices began to fall in foreign markets. This price fall was dangerous for the Polish oil industry. In Poland, crude oil production was more expensive than in other countries (Zjazdy..., 1931, pp. 90–94). This state of affairs worried the government. Already in the spring of 1931 it initiated negotiations of all groups in the industry. The case was entrusted to former Minister Marian Shydlovsky. Since then, pure producers and companies from the Oil Industry Syndicate had begun lengthy negotiations to form a new joint organization. It should consist of all groups in the oil industry. It was planned to organize all pure producers, separately pure refineries together with producers-refineries. Then, to establish a joint institution that would unite both organizations in brine supply and selection (Mikucki, 1931a, pp. 473–475; Mikucki, 1931b, pp. 422–423; Proces..., 1932, pp. 141–147; Sprawozdanie..., 1932, pp. 140–141; Sprawozdanie..., 1933, p. 134).

The government, in turn, began to regulate oil law. As a result, on March 18, 1932, the law was passed and it entrusted the Ministry of Industry and Trade significant powers: to issue bans on the export and import of crude oil and oil products, to set customs rates, to regulate the price of raw materials, to centralize in one organization all cycle of brine and oil

products, to create stocks, to use funds to support oil production. For six months only, the law provided for the voluntary organization of the oil industry. Otherwise, the Ministry of Industry and Trade would create it by force (Ustawa..., 1932).

On May 19, 1932, the Syndicate of Crude Oil Producers was established (in Polish – *Syndykat Producentów Ropy*) (Mikucki, 1932, pp. 245–247; *Sprawozdanie...*, 1933, p. 135). In mid-1932, an agreement was reached between crude oil producers and refineries. According to the agreement all crude oil from pure producers was taken away by the Syndicate refineries. Its price was regulated depending on the Polish and export prices for final products. This regulation allowed the Oil Industry Syndicate to keep prices high. They fell only when the Syndicate began to lose influence in the Polish market. Small refineries developed and captured the domestic market, and the Syndicate members could not influence them. At the same time, there could be no argument that small businesses had less money because they did not invest in technology, which led to large losses of raw materials. At the same time, there could be no argument that small businesses had less money because they did not invest in technology, which led to large losses of raw materials. Instead, small businesses sold all their products in the domestic market, where there were relatively high prices for oil products (*Naokoło...*, 1932, p. 172; *Porozumienie...*, 1932, pp. 333–336, 353–354; *Zasady...*, 1932, pp. 150–170).

The final agreements of all groups in the industry were not reached, and on October 12, 1932, the Minister of Industry and Trade forcibly organized foreign trade in oil and oil products at the Polish Oil Exports Institution (in Polish – *Polski Eksport Naftowy*) with its the centre in Lviv. On May 1, 1933 the Institution began work under the statute announced on March 31, 1933 (*Rozporządzenie...*, 1932; *Sprawozdanie...*, 1934, p. 109).

The Polish Oil Exports, by determining the export contingents of oil products, thus regulated the Polish market, as it first clarified the domestic needs. By setting domestic contingents within a real demand in certain months, the organization prevented oversupply. Thus, it weakened competition without eliminating it and not setting prices, which during the Syndicate functioning gave rise to many complaints by buyers. Depending on the size of the Polish and export contingents from refining in each refinery, the Polish Oil Exports influenced the maintenance of crude oil prices indirectly; each refinery was interested in increasing processing, and thus the purchase of raw materials in the free market. When the Polish Oil Exports was established, small refineries were theoretically required to participate in scarce exports, but they had privileges compared to big refineries. The smallest companies were completely exempt from exports, and the slightly bigger ones instead paid to the drilling fund the part of difference between the Polish and export prices. This is how their “more difficult” situation was taken into account (*Ankieta...*, 1934; *Sprawozdanie...*, 1934, pp. 109–110).

All these changes affected the development of the oil industry significantly. This is the most noticeable in the gross prices of Boryslav crude oil. In the first half of 1933, when the Oil Industry Syndicate still operated, it declined constantly from 1 511 zł in January to 1 255 zł in July. After the creation of the Polish Oil Exports the price increased from 1 375 zł in August to 1 570 zł in December. This price increase was crucial for the ability to retain and develop oil production; it had a positive effect on the stabilization of prices for final products in the Polish market (*Sprawozdanie...*, 1934, p. 110).

In the beginning, the Union of Polish Oil Producers was skeptical of the Polish Oil Exports. It believed that this organization would act similarly to the former cartel institutions, i.e., in the interests of big refineries (*Moment...*, 1932, pp. 233–238). However, this did not happen. Under

pressure from the government the Polish Oil Exports worked in the interests of the Polish oil production mainly. Therefore, over time, the rhetoric of pure producers regarding this institution changed and it became a defender of the Polish Oil Exports (Sprawa..., 1935, pp. 13–15; Sprawy..., 1936, pp. 146–148; Szlemiński, 1933b, p. 109; W obronie..., 1936, p. 301). Owing to the activities of this institution, it was possible to organize the oil industry in interwar Poland successfully, to stabilize relations in this area, which contributed to its development.

**The Conclusion.** The problem of organizing the oil industry in interwar Poland was key to the development of this industry. At that time, crude oil production decreased significantly and Galicia ceased to play an important role in the oil industry of the world. On the other hand, it was important for interwar Poland to have its own oil products in case of war. The ownership structure of enterprises in the industry changed. After the proclamation of the Polish statehood, the Polish citizens got little in the oil industry and owned small and medium-sized enterprises mainly. The Polish state, however, continued to govern the biggest oil refinery in Drohobych. Instead, foreigners continued to own the majority of big refineries and managed to buy up many oil fields. However, the German and Austrian ownership of oil companies was replaced by the French. The task was to organize different groups of the oil industry to avoid undesirable competition and ensure the development of oil production. It was not possible to organize the whole industry properly. This was hampered by disputes between individual foreign companies, between foreign and local entrepreneurs, and etc.

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**“BECAUSE HISTORY IS A TEACHER OF LIFE”: HISTORICAL POLICY  
OF EDITORIAL OFFICE OF THE PERIODICAL “NASH LEMKO”**

**Abstract.** *The purpose of the research is to determine the peculiarities of the historical policy of the periodical Nash Lemko” (“Our Lemko”). The methodology of the research is based on the interdisciplinary approach. The following methods and approaches have been used in the article such as: systematic, comparative and critical analysis of the source base represented by large text arrays. Due to the application of the content analysis technique, it was possible to carry out the correct interpretation of diverse genres of the newspaper information. The scientific novelty consists in making the attempt in order to analyze the historical ideology comprehensively constructed by the editors of the periodical “Nash Lemko”. The Conclusions. Summarizing the historical policy of the magazine editors of “Nash Lemko”, we should note its conceptual thoughtfulness, genre diversity and richness of content. The eternal connection of the Ruthenian with the Ukrainian was affirmed consistently on the pages of the magazine in numerous popular science articles, local lore, journalistic essays and works*

of art. The conciliar ideology was established by “anti-Polonization” of the historical consciousness of the Lemkos, who were denationalized violently by the propagandists of the Second Polish-Lithuanian Commonwealth. Along with this, in the periodical “Nash Lemko” the articles focused on education of local patriotism. Encouraging an in-depth acknowledgment of their own history and culture, the magazine’s editors motivated them to transform the gloomy present vigorously and create a balanced future. All the above-mentioned measures had an important consolidating effect on the Ruthenian community on the eve of the difficult trials of World War II. Owing to such kind of historical policy, the Lemkos emerged as one of the most consolidated emigration communities after being ousted from their native lands.

**Key words:** “Nash Lemko”, the Ruthenians, historical policy, conciliar ideology, the Polish-Lithuanian Second Commonwealth.

## **“БО ІСТОРІЯ – ЦЕ ВЧИТЕЛЬКА ЖИТТЯ”: ІСТОРИЧНА ПОЛІТИКА РЕДАКЦІЇ ЧАСОПISY “НАШ ЛЕМКО”**

**Анотація. Мета** дослідження полягає у з’ясуванні особливостей історичної політики редакції часопису “Наш лемко”. **Методологічне підґрунтя** роботи становить міждисциплінарний підхід. У статті використано такі методику та підходи, як систематичний, порівняльний і критичний аналіз джерельної бази, представленої великими текстовими масивами. Здійснити коректну інтерпретацію різножанрової газетної інформації уможливило застосування методики контент-аналізу. **Наукова новизна** статті полягає у спробі комплексного аналізу конструйованої редакторами “Нашого лемка” історичної ідеології. **Висновки.** Підсумовуючи історичну політику редакторів “Нашого лемка”, відзначимо її концептуальну продуманість, жанрову різноплановість і змістову насиченість. На сторінках часопису у численних науково-популярних дописах, краєзнавчих розвідках, публіцистичних нарисах і художніх творах послідовно утверджувався одвічний зв’язок русинства з українством. Ця соборницька ідеологія утверджувалася шляхом “відпольщення” історичної свідомості лемків, що зазнавали гвалтовного денационалізуючого впливу пропагандистів Другої Речі Посполитої. Водночас, чимало уваги “Наш лемко” присвячував вихованню місцевого патріотизму. Заохочуючи до глибокого пізнання власної історії та культури, редактори часопису спонукали енергійно перетворювати неприглядне сьогодення та виважено творити майбутнє. Усі ці заходи мали важливий консолідуючий вплив на русинську спільноту напередодні складних випробувань, котрими виявилася Друга світова війна. Завдяки такій історичній політиці лемки постали як одна з найбільш згуртованих еміграційних спільнот після вигнання з рідних земель.

**Ключові слова:** “Наш лемко”, русини, історична політика, соборницька ідеологія, Друга Річ Посполита.

**The Problem Statement.** In the Second Polish-Lithuanian Commonwealth the Ukrainian community faced a real threat of losing its identity as a result of an aggressive national policy of the Polish governments. The point is that new owners of the Ukrainian territories of Austria-Hungary tried to undermine the national choice of the largest minority in restored Poland at all costs. It was manifested in an arbitrary attempt to impose the use of an old ethnonym the “Ruthenians” instead of a modern one – the “Ukrainians”, to introduce a new geographical name “Eastern Małopolska” instead of the traditional indigenous people toponym “Halychyna”, and, finally, to delay legal obligations, taken at international arena, to Ukrainianize primary and secondary schools and opening of the Ukrainian university. However, the joint efforts of the Galician community allowed to neutralize the state plans to dissolve the Ukrainians in the “Polish Sea”.

It should be mentioned that such struggle for the right of the Ukrainians to their own national choice was much fiercer on the periphery of the ethnic settlement of our people in the hard-to-reach region of the Eastern Beskyds. In this region, due to a low population

density, low literacy and long residence in a non-ethnic environment, the Polish authorities behaved particularly unceremoniously. The Polish government representatives facilitated the forced conversion of the population from the Uniatism to the Orthodoxy and the Catholicism, they polonized the public school arbitrarily, banned the distribution of the Ukrainian institutions and publications cynically, and etc. The representatives of the Western Ukrainian intelligentsia, especially the Ruthenian activists, realizing that the fate of the Ukrainians was being decided on the territory of the Lemko region, decided to oppose such a violent denationalizing policy. At the same time, the most effective tool was publishing a newspaper for people, which was designed to raise awareness of the Lemko community and provide it with the necessary ideological antidote. The renowned biweekly the “Nash Lemko” became such periodical (1934 – 1939). There was much written about its diverse influence on the Ruthenian community of the Second Commonwealth up till nowadays. Instead, the discursive practices issue of the editors of the publication of the historical and ideological plan is still on the periphery of research interests, due to which the Lemkos largely made the Ukrainian choice. Hence, the issue of the historical policy of the “Nash Lemko” becomes relevant for modern historiography.

**The Analysis of Recent Researches.** Taking into consideration the special importance of the “Nash Lemko” as a historical source for the reconstruction of the interwar Ruthenianism history, it was mentioned in the historiography of the Lemko studies a number of times (Nakonechnyi, 2017; Nakonechnyi, 2018; Telvak & Nakonechnyi, 2020; Telvak & Nakonechnyi, 2021). At the same time, currently there are no independent studios to clarify the peculiarities of the historical ideology constructed by the editors of the “Nash Lemko” and broadcast to a wide range of the Ruthenian circles. Hence, it determines the topicality of our study.

**The purpose of the research** consists in determining the peculiarities of the historical policy of the periodical “Nash Lemko”.

**The Results of the Research.** The main task for the editors of the “Nash Lemko” in the course of constructed historical policy was to oppose the theses of the Polish propaganda about the ethnic connection of the Ruthenians with the Polish people. Such kind of the “anti-Polonization” of the Lemko’s historical consciousness took place owing to the active popularization of the idea of an organic connection of the historical destiny of the Ruthenianism with the Ukrainian people. Much attention was paid to the manipulative nature of the Polish chauvinists’ claims in their desire to deny that the Lemkos belonged to the Ukrainians. The Polish chauvinists produced increasingly surprising ethnogenetic myths such as the Wallachian origin of the Lemkos.

In the periodical “Nash Lemko” it was denied the anti-Ukrainian nature of the Polish propagandists thoroughly by providing numerous examples in order to prove the historical unity of the Ruthenians with their counterparts from Bukovyna, Halychyna, Volyn, and Naddniprovyanshchyna. The editorial board of “Nash Lemko” emphasized the following in order to affirm consistently the catholicity vision in the Lemko community: “[...] Lemkivshchyna was inhabited by the Slavs as well as Boykivshchyna, Podillia and Volyn, those Slavs had the same faith and language and customs and clothes as their brothers near Lviv and Kyiv. [...] We are not the Wallachians, only thousands of years ago some of our ancestors settled on the Wallachian territory. Namely, local people, who lived in the Lemko Pidkarpattya (Subcarpathians) since time immemorial, and brothers and sisters from Podillia, Volyn and Nadniprovyanshchyna, as well as from distant Chernihiv region, came and settled near them” (Lemko, 1934, p. 4).

The editors of the periodical “Nash Lemko” rejected any existing Polish influences on their own history and culture categorically and emphasized constantly that the Ruthenians from chronicle times – ideologically and economically – oriented exclusively on the East Slavic territories. “As we can see, the Lemko region still had living ties only with the east”, – in the periodical “Nash Lemko” it was summed up the controversy with the Polish ideologues. – Allegations that all Lemko churches were built by the Polish gentry are also untrue. In the church chronicles it is clearly written that the Lemkos built churches together, and some churches were built by the Lemkos-soltysy” (Lemko, 1934, p. 4).

It should be noted that, in addition to historical arguments, the language policy of the editors also contributed to the establishment of a conciliar sense in the Lemko environment. Contrary to the Muscovite newspaper “Lemko”, which was basically published only in the Ruthenian (Nakonechnyi, 2020), the publishers of the Ukrainophile edition varied the language discourse in their newspaper. Some of the articles, which mostly had an intra-Lemko content, were published in the Ruthenian dialect. Instead, the articles of a broader cultural and ideological orientation were presented in the literary Ukrainian language. Explaining the language policy, the editors wrote the following: “[...] We will write in that newspaper in the literary language and our Lemko language. The literary language is used in order to give readers a model of a correct language, such as is spoken around Kyiv, which was written by our poets, such as: Taras Shevchenko, Ivan Franko and now all writers write, and which we all need to know. Reading articles written in the literary language, the Lemkos learn and see that the Lemko’s speech is both a spirit and a component [...] a native child of our common native language of writing, and not some other, foreign” (Do nashykh chytachiv, 1934, p. 2).

Having affirmed in the readers’ minds the understanding of the eternal Ukrainianness of the Lemko sub-ethnic group, the editors of the periodical tried to answer a crucial historiosophical question concerning the peculiarity of the historical mission of the Ruthenianism among all other tribes of our people. Exposing the fact of the geographical location of the Lemko region as the most western Ukrainian region was exposed, such mission was determined to become a reliable bastion of the Ukrainians on the western edge of the East Slavic world. The famous Lemko poet O. Kostarevych shared the above-mentioned idea the following: “Relying on the High Tatras, you stand in the far West as if on guard of the Great People. With your body you restrain the overwhelmed pressure of the foreign tribes for centuries” (Kostarevych, 1934, p. 3).

According to the publishers of the “Nash Lemko”, the Muscovite ideology posed no less danger than the Polish propaganda. It could be explained by the fact that the Old Ruthenian cultural influences were traditionally popular in the Lemko environment. Taking into account this fact, the authors of the periodical convinced their readers that the cultural Slavophilism of the Galician leaders of the XIXth century had nothing to do with the aggressive ideology of modern Muscovite. Its representatives, it was explained in many articles of the “Nash Lemko”, in alliance with the Polish officials tried at any cost to break the link between the Ruthenian and the Ukrainian, turning the Lemkos into the ethnic material for foreign cultures (Ne tishsia, 1939, p. 4; Vsevolod Yaroslavych, 1939a, p. 7). One of the active authors of the periodical under the pseudonym Vsevolod Yaroslavych explained to his readers: “In the Lemko region the Muscovite leaders and figures tried their best to obscure, distort and completely extinguish the national consciousness of the Ukrainian Lemkos” (Vsevolod Yaroslavych, 1939a, p. 7).

The ideological confrontation between the publishers of the “Nash Lemko” and the Muscoviteism revolved around the issue of covering the Thalerhof tragedy – extrajudicial

imprisonment and mass executions of the Galician population due to mostly unfounded suspicions of its cooperation with the Russians. The Muscovites blamed conscious Ukrainians of this “hell of the Galician Ukraine”, who allegedly sent their ideological opponents to the gallows and concentration camps by denunciations to the Austrian authorities. Providing numerous eyewitness testimonies, the authors of the Ukrainian periodical argued that the real causes of the tragedy were the Muscovites themselves, who, with hypertrophied zeal for the Russian officials during the occupation of the region, brought on the terror of the Austrian military administration to the local population (Yizdiat sobi, 1934, p. 2).

In the second half of the 1930s, the events in Naddniprovyanshchyna, when the Stalinist regime launched an aggressive anti-Ukrainian campaign that targeted prominent Ukrainian figures, prompted the editorial board of the “Nash Lemko” to reflect on the Ukrainian-Russian relations more deeply. In many publications on the above-mentioned issue, which was little known to the majority of Lemkos, the Russian imperialism was compared to the Polish justifiably in terms of danger to the existence of our people. While depicting the Ukrainian-Russian confrontation, the authors of the “Nash Lemko” resorted to the metaphor of an eternal struggle of the Western civilization with the anarchy of the Asian East. Describing the tragedy of our people’s relations with their eastern neighbour, the following was mentioned in the editorial post: “The Ukrainian-Moscow rivalry dates back to the ancient times of the Ukrainian Kyivan State and extends an inseparable thread from all the centuries of our past up to the present moment. Moscow is written in bloody letters on the pages of our history. [...] Moscow brought us fires and ruin, destruction and death, on the bayonets carried to us fratricidal calls that disarmed our spirit, so that to tighten the loop around our necks harder (Yak Moskva ponevoliuvala, 1936, p. 2).

According to the editors of the “Nash Lemko”, the education of readers’ culture was the key to success of the pro-Ukrainian historical consciousness formation in the Lemko environment. Consequently, the periodical introduced in its structure a permanent column “What kind of books to read?” since the first issues, which often referred to the most popular historical works. “First of all, we need to know that we have such kind of books that will become the fireproof pillars, – it was mentioned in the periodical. – Such book is the history of our Ukrainian people. There we can see all glorious deeds of our ancestors, because history is a teacher of life. It teaches us good omens, shows us how to avoid evil, useless deeds and actions” (Yaki knyzhky chytaty?, 1934, p. 2).

The readers’ interest in the mentioned column prompted the editors of the “Nash Lemko” to introduce a new structural part of the periodical, devoted to historical and local lore issues exclusively. The publishers of the “Nash Lemko”, justifying the need for a new historical column, pointed out the following: “At the request of our readers, we begin to conduct a historical corner with this issue to give everyone the opportunity to get acquainted with native history. A human being, who does not know one’s own history becomes a slave, a dung of the others” (Podii, 1934, p. 5). According to the editors, the historical and local lore essays created by experienced researchers were designed in order to educate a reader to understand the value of their own cultural heritage (Lemkivshchyna, 1938, p. 12) and the unity of the historical destiny of the Ruthenians with the rest of the Ukrainian people (Vsevolod Yaroslavych, 1939b, s. 11). The above-mentioned historical column had the following rubrication components: “From our Native Villages”, “From our Towns and Villages”, “Let’s Travel across our Native Villages”, “Let’s Get to Know our Native Villages”, “Let’s Travel across our Native Land”, “The Events in the History of Ukraine” and the others. The historical

page of the "Nash Lemko" most often contained descriptions of such significant events in the history of our people as the 950th anniversary of the baptism by Volodymyr of Ukraine (U 950-littia, 1938), the November Disruption (Den 1 lystopada, 1934), the Act of Unification (Perelomovi dni, 1935), the Battle of Kruty (Trysta khorobrykh, 1935) and the others. The periodical magazine "Nash Lemko" also tried to develop the historical culture of its readers by means of fiction word. A number of historical fiction devoted to the legendary history of Lemkivshchyna was published in the magazine. The main characters were brave Ruthenian princes (for example, Yakun), who rule their people justly and in solidarity with them resist the overwhelmed appetites of neighbours (Fylypchak, 1935, p. 7). The authors of those historical stories were such renowned Ruthenian publicists as I. Fylypchak, V. Kachmarsky, V. Kosar, M. Kyparys, and the others. Regarding modern era, the periodical "Nash Lemko" published the eyewitness memoirs about the tragic events of World War I and heroic times of the Ukrainian Revolution in western Ukraine regularly.

It is important that the editorial board of the "Nash Lemko" not only spread the ready-made historical knowledge to its reader, but also encouraged to write the history of the native land together. To this end, the periodical published an appeal to the public to record historical testimonies from the elders, to record ritual practices and to describe the toponyms and hydronyms of their villages in order to achieve this goal (Zbyraimo, 1935, s. 3). The editorial board invited readers to cooperate and explained it the following way: "The question: Where did we the Lemko Ukrainians come to the Carpathians and expanded this wedge all the way out of the Poprad – is very interesting. In order to solve the above-mentioned question properly and provide our scholars with relevant materials for this solution, we must all undertake this work" (Za slidamy mynuloho, 1935, p. 3). Hence, in order to facilitate that work, the editorial board of the "Nash Lemko" developed a special questionnaire, improving periodically and publishing it on the pages of the periodical. According to numerous correspondents' articles under the joint headline "The Earth as a Witness to the Past", the idea of involving the Lemkos in local history work found a considerable support among them.

A vital element of historical policy is the formation of the national Pantheon, the figures of which, through universal recognition and acceptability, should unite the community with an awareness of common values. In the periodical "Nash Lemko" we can spot a rather complex hierarchy of national heroes of both regional and national dimensions. The cult figure of all Ukrainians Taras Shevchenko was placed at the top of the National Pantheon justifiably. The editorial board of the "Nash Lemko", as other Ukrainian publications usually did, always devoted the first of March issues to honoring the Kobzar, who was certified the "Prorok" ("Prophet") and the "Apostle of Our Truth and Will" in the periodical. At the same time, a biography of the poet was briefly cited with an emphasis on his peasant origins, miserable hungry childhood and life's wanderings in foreign lands. It was supposed to evoke empathy in the Ruthenian reader, who often had similar life experiences. T. Shevchenko's days issues were illustrated in abundance with portraits of Kobzar, sketches of related locations, and also contained the most popular poetic works of our genius.

In explaining the national significance of T. Shevchenko, his mission as an exponent of the suffering and hopes of all enslaved Ukrainians was emphasized. The periodical "Nash Lemko" tried to explain what an outstanding poet was for our people, wrote the following: "As a good father for children, so was he for the innocent people, defended with all his heart, wrote and dreamed of our past, bravely showed the national insults before the tsars-executioners' eyes and sought for the brothers' freedom by loud words. As a father, he rebuked his people for bad

and wrong deeds, but also taught them how to do good deeds. He is also our teacher, because he taught all Ukrainian brothers how to love their land and people in order to achieve a better destiny” (Taras Hryhorevych Shevchenko, 1934, p. 2). Taking into consideration such kind of description, the periodical strongly advised its readers to get acquainted with “Kobzar”, which was called “the most famous and interesting book we have”. The editors repeatedly emphasized that every Lemko house must have Shevchenko’s Kobzar.

Along with T. Shevchenko, the pages of the “Nash Lemko” honored from time to time another poetic genius of the Ukrainians – Ivan Franko. The August issues of the magazine were devoted to demonstrate Kameniar’s national feat, similar to the practice of celebrating T. Shevchenko’s days. Introducing the readers to the national service of Ivan Franko, the periodical “Nash Lemko” emphasized that it was the Galician poet “among the wildest thickets paved the way for the others, the stonemason who for many years pounded the rock of inaction, indifference, the one who broke the hearts and consciences of his people – was the Moses, who led the people to the inhabited land of people’s happiness and fell on that path...” (Ivan Franko, 1934, p. 3).

Among the prominent figures of modern times, as expected, the figures of the Ukrainian Revolution on both sides of the Zbruch dominated completely. At the same time, personal accents often determined the events of the memorial plan. Hence, a true tragedy for the Ukrainians was the untimely death of Mykhailo Hrushevsky, the Tsentralna Rada Chairman and “our greatest and most glorious historian” in November of 1934 (Pomer M. Hrushevskiy, 1934; Telvak, 2008, p. 350). Along with it, much attention was paid to prominent Ruthenian figures on the pages of the periodical “Nash Lemko”. The reason for attention was anniversaries or memorial events. Among those honored figures by the periodical we came across spiritual pastors (R. Vynnytsky, M. Denko, A. Malyniak), former Ukrainian Sich shooters (V. Yurchenko, V. Skrypchuk), cooperative figures (V. Polyanskyi, H. Bankivskiy), educational figures (M. Yurha, V. Tchaikovskiy, V. Yavorsky) and cultural figures (B.-I. Antonych, V. Tchaikovskiy). In all the letters of such plan, the sacrificial service of the mentioned persons to the Lemko community was mentioned.

Encouraging their readers to cultivate historical memory in the regional and national dimensions, the editors of the “Nash Lemko” drew attention to the importance of creating historical museums. Thus, when the first Lemko Museum in Sanok was established, the periodical’s editors appealed to the Ruthenians to enrich its collections with their own antique items. Explaining the importance of the existence of such cultural centers, “Nash Lemko” highlighted the importance of their memorial mission: “Such museum is needed. In the museum as in a mirror you can see our past” (Lemkivskiy Muzei, 1934, p. 4). It should be noted that the editors of the periodical informed their readers about the affairs of the native museum constantly, encouraging the growth of its stock collections.

Finally, we can say that about the problem of reception by readers of the “Nash Lemko” features of the historical and ideological component of the periodical, we cannot say much, because the preserved archive of the editorial office contains almost no correspondence. Instead, we have numerous pieces of evidence that the government officials reacted with considerable concern to the historical policy of the Ruthenian newspaper. Eloquent evidence of it is the abundant empty columns left by the censor’s hand in those sections where historical essays were contained. Nowadays we have a unique opportunity to reconstruct the censored parts of the posts, because in the library of Ivan Franko National University of Lviv there is a single full-text copy of the periodical “Nash Lemko” from the censorship committee. Its

comparison with the censored version suggests that the texts of the historical and ideological plan were most often intervened. It is eloquent evidence of the correctness of the editorial policy chosen by the publishers.

**The Conclusions.** Summarizing the historical policy of the editors of the periodical “Nash Lemko”, we should note its conceptual thoughtfulness, genre diversity and richness of content. The eternal connection of the Ruthenian with the Ukrainian was affirmed consistently on the pages of the periodical in numerous popular science articles, local lore, journalistic essays and works of art. The conciliar ideology was established by “anti-Polonization” of the historical consciousness of the Lemkos, who were denationalized violently by the propagandists of the Second Commonwealth. Along with this, the magazine “Nash Lemko” paid much attention to the education of local patriotism. Encouraging an in-depth acknowledgement of their own history and culture, the magazine’s editors motivated them to transform the gloomy present vigorously and create a balanced future. All the above-mentioned measures had an important consolidating effect on the Ruthenian community on the eve of the difficult trials of World War II. Owing to such kind of historical policy, the Lemkos emerged as one of the most cohesive emigration communities after their expulsion from their native lands.

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**CIVIC POSITION OF THE GREEK CATHOLIC CLERGY IN THE ELECTIONS TO THE POLISH SEJM AND THE SENATE IN GALICIA (NOVEMBER OF 1922)**

**Abstract.** *The purpose* of the study is to elucidate the civic position of the Greek Catholic clergy during the elections to the Polish Sejm and the Senate in November of 1922. **The research methodology** is based on the principles of historicism, systematization, scientificity, objectivity, use of general scientific (analysis, synthesis, generalization), special and historical (historical and genetic, historical and typological, historical and systemic) methods. **The novelty** of the study is that there has been done a substantive analysis of the Polish authorities policy against the Greek Catholic clergy before and under conditions of the elections to the Polish Sejm and Senate in November of 1922; there has been clarified the attitude of the Polish authorities to the activities of Father Mykola Ilkiv, who supported the participation of the clergy in the elections. **The Conclusions.** The majority of the Greek Catholic clergy strongly boycotted the elections to the Polish Sejm and the Senate on November 5 and 12, 1922.

*Priests suspected of anti-Polishness were subjected to various persecutions and repressions by the Polish law enforcement agencies. Priests were often fined, the Polish police searched the homes of the clergy, and conducted audits in the Greek Catholic churches. Dozens of priests from different parts of Galicia were arrested. Only a small part of the Greek Catholic clergy supported the pro-Polish Ukrainian Farmers' Party (UCP) in the elections, which was headed by the priest Mykola Ilkiv. The boycott of the parliamentary elections of 1922 by the Ukrainian population showed that the majority of its inhabitants did not recognize the legitimacy of the Polish government. The Greek Catholic Church, with its consistent position, confirmed the reputation of the national Church.*

**Key words:** *the Greek Catholic clergy, the Polish authorities, elections to the Sejm and Senate in 1922, elections boycott, repressive policy, priest Mykola Ilkiv.*

## ГРОМАДЯНСЬКА ПОЗИЦІЯ ГРЕКО-КАТОЛИЦЬКОГО ДУХОВЕНСТВА ПІД ЧАС ПРОВЕДЕННЯ ВИБОРІВ ДО ПОЛЬСЬКОГО СЕЙМУ І СЕНАТУ В ГАЛИЧИНІ (листопад 1922 р.)

**Анотація.** *Мета дослідження* полягає у розкритті громадянської позиції греко-католицького духовенства під час проведення виборів до польського сейму і сенату у листопаді 1922 р. **Методологія дослідження** ґрунтується на принципах історизму, системності, науковості, об'єктивності, використання загальнонаукових (аналіз, синтез, узагальнення) та спеціально-історичних (історико-генетичний, історико-типологічний, історико-системний) методів. **Новизна дослідження** полягає у тому, що здійснено предметний аналіз політики польських органів влади проти греко-католицького духовенства напередодні і в умовах проведення виборів до польського сейму і сенату у листопаді 1922 р.; з'ясовано ставлення польських властей до діяльності отця Миколи Ільківа, що підтримав участь духовенства у виборах. **Висновки.** Більшість греко-католицького духовенства рішуче бойкотували вибори до польських сейму і сенату 5 і 12 листопада 1922 р. Священники, запідозрені у антипольськості, піддавалися різним переслідуванням і репресіям з боку польських правоохоронних органів: їх нерідко штрафували, польська поліція проводила обшуки у їх помешканнях, здійснювала ревізії у греко-католицьких церквах. Було арештовано десятки парохів із різних куточків Галичини. Лише незначна частина греко-католицького духовенства підтримали на виборах пропольську Українську хліборобську партію (УХП), яку очолив священник Микола Ільків. Бойкот парламентських виборів 1922 р. українським населенням продемонстрував, що більшість його мешканців не визнають законності польської влади. Греко-католицька церква своєю послідовною позицією підтвердила реноме національної Церкви.

**Ключові слова:** *греко-католицьке духовенство, польська влада, вибори до сейму і сенату 1922 р., бойкот виборів, репресивна політика, священник Микола Ільків.*

**The Problem Statement.** Traditionally the Ukrainian Greek Catholic Church played an important role in the socio-political life of Galicia. Without a priest of this denomination, in our opinion, it is impossible to imagine, let's say, a national revival in the region during the XIXth century or the national movement of the first half of the XXth century. In fact, there was no significant Galician-Ukrainian politician of that time who was not directly or indirectly of a priestly origin. On the other hand, largely for this reason, the Austrian and later Polish authorities tried to manipulate the influence and authority of the GCC (we will use the shortened period under analysis) in their interests, realizing that cooperation with priests – to some extent is the key to a controlled ethno-political situation in the region.

In our opinion, the issue we will discuss below also belongs to these series. In July of 1919, after the retreat of the UGA behind the Zbruch territories, the ruling circles of Poland, tried at all costs to establish the “Polishness” on the occupied lands, eliminating any signs of their Ukrainian origin, calling Galicia “Eastern Małopolska” and the Ukrainians – the “Rusyns”. The elections to the Sejm and the Senate, scheduled for November of 1922, were to

play a significant role in consolidating the process of Eastern Galicia annexation. By holding elections, government agencies sought to formalize Poland's jurisdiction over the region and persuade the international community, that the very fact of the participation of the Ukrainian population in them is evidence of the Ukrainians' tolerant attitude to the new government and manifestation of the population's desire to remain the part of the restored Polish state.

**The Analysis of Recent Researches and Publications.** According to the apt words of Lviv historian Oleksandr Zaitsev, unwilling to hold a real plebiscite in Eastern Galicia, the Polish ruling circles sought to replace the plebiscite with elections" (Zaitsev, 1999). Lviv researcher Oleksandr Turchak studied the historical and legal aspects of the elections of 1922 (Turchak, 2014). Ternopil historian Lesia Aleksiyevets focused on the activities of the Sejm and the Senate of the first convocation of the Second Commonwealth (Aleksiievets, 2010). Lviv historian Orest Krasivsky analyzed the issue of the elections of 1922 in the context of the activities of the Ukrainian political parties in Galicia during the formation of the Polish state (1918 – 1923) (Krasivskyi, 2006). Ivano-Frankivsk scholar Ruslan Deliatynsky is the author of a number of articles that elucidate the socio-political activities of priests of Stanislaviv Eparchy during the period of 1919 – 1922 (Deliatynskyi, 2003; Deliatynskyi, 2005; Yehreshii & Deliatynskyi, 2020). Drohobych scholars Mykola Haliv and Anna Ohar suggested the idea of analyzing a representative document that sheds light on the Polish government's attitude toward the Ukrainian Greek Catholic clergy in Drohobych County in the mid-1920s (Haliv & Ohar, 2018).

In Polish historiography, the issue of the election of 1922 in the context of the normalization of the Ukrainian-Polish relations in Poland, was analyzed by famous historians Myroslava Papezhynska-Turek (Papierzyńska-Turek, 1979) and Ryszard Tożeczki (Torzecki, 1989). The Ukrainian historian-scholar Vasyl Futala analyzed and expressed his point of view on the works written by the Polish scholars on the Ukrainian issues (Futala, 2020).

An important monographic study by Lviv historian Liliانا Hentosh deserves attention among domestic scholars who do research on church issues (Hentosh, 2015). We will also single out the work of Ivano-Frankivsk scholars Vasyl Marchuk (Marchuk, 2001) and Ihor Pylypiv (Pylypiv, 2011), Kyiv historian Vitaliy Pereveziiy (Perevezii, 1998; Perevezii, 2004). However, the problem of the role of the Greek Catholic clergy in the preparation and conduct of the elections of 1922 is elucidated by them, in our opinion, superficially, and therefore the topic has not been the subject of a special study in the Ukrainian and foreign historiography yet.

**The Purpose of the Research.** In the article we will try to explain the position of the Greek Catholic clergy before the elections to the Polish Sejm and Senate in November of 1922.

**The Results of the Research.** The Polish government considered the successful holding of elections in Galicia to be one of its strategic objectives for the year of 1922. In case of their failure, Poland's jurisdiction over the entire territory of Galicia could be called into question (Zaitsev, 1999, p. 3). Thus, the Ukrainian politicum faced a difficult problem to solve: to take part in the elections (which meant the de facto recognition of the Polish government in the region), or to boycott the election (but to lose the opportunity to defend the rights of the Galician Ukrainians in parliament). Finally, on September 10, 1922, the emigration government of the Western Ukrainian People's Republic (ZUNR), headed by E. Petrushevych, accepted the appeal "To the Population of the Galician Land!" calling for a boycott of the election: "The Ukrainian people of Galician Land cannot and must not take part in the elections to the Polish Sejm, because the Ukrainian people must not renounce their sovereignty on their own land at any cost..." (Z vidozvy, 1922).

The exile government also appealed to the Greek Catholic clergy: “Priests! The closest leaders of the people! ... You, as servants of the Christ, are obliged and must serve the truth and only the truth! Can you, by participating in the elections, witness the Polish lie that Poland-occupant has the right to hold the elections in Galicia? Can you advise your priests’ fold to take part in this violence? Wouldn’t be in vain the sacrifices of the tortured lives in Thalerhof, stoned by a savage crowd of servants of the God – priests? Or a blood victim of Fathers Pidliashetsky, Halibey, Nizhankonsky (*Nyzhankovskoho* – the authors) and other priests who gave their lives for the state’s law, should it be in vain? Honestly and boldly proclaim the truth to your fold devoted to your spiritual care! Do not go to the polls and do not allow your fold to go to the election! To suffer for the truth is a sacred duty of the Christian idea bearers. Be cheerful and exemplary! The whole Galician land turns its eyes to you, as in times of persecution of the leaders of the God word” (Z vidozvy, 1922).

The elections to the Sejm and the Senate scheduled for November of 1922 provoked a strong opposition not only from the exile government of the Western Ukrainian People’s Republic, almost all Ukrainian parties, but also from a significant number of the clergy. The Galician Ukrainians did not consider themselves citizens of the Polish state, hoping to restore their own statehood.

A graduate of the Lviv Theological Seminary Ilko Kubarych from Obelnytsia, Rohatyn County, under the pretext that Galicia does not belong to Poland, resigned as a member of the election commission in his native village and began to conduct anti-election campaigning in the county (in the communes of Obelnytsia, Yunashkiv, and Kunychi), called for a boycott of the upcoming elections. The Polish police considered I. Kubarych’s behaviour “unworthy” because he “disturbed public peace”. On October 8, 1922, he was taken to the county police department in Rohatyn. Explaining his position during interrogation, the seminary graduate referred to Article 25 of the law on elections to the Polish Sejm of July 28, 1922, according to which a member of the commission may be a person who has the right to vote and “can read and write in Polish”. According to Ilko Kubarych, he is not a citizen of Poland (because legally Eastern Galicia did not belong to the Polish state at that time) and does not speak Polish, then, accordingly, he cannot be a member of the election commission. I. Kubarych was soon arrested (SALR, f. 1, d. 14, c. 1552, pp. 28v., 30; Dilo, 1922). Mykola Klement Dubnitsky, a graduate of the Lviv Seminary from Lavochne in Skoliv Region, was accused of being a member of a secret Ukrainian university (SALR, f. 1, d. 14, c. 1552, p. 31).

The clergy often persuaded the Ukrainians not to go to the “polling station”, and in the case of nominating the Ukrainian candidates called to vote for the Ukrainians (Farther Roman Isaichuk, Lisko near Sanok). There were cases when the clergy during the sermon in the Church warned the Ukrainians against participating in elections, advised to expel the communal because they call for “evil and abyss” (Topilnytsia commune, Filariy Ortynsky) (Archiwum Akt Nowychw Warszawie (AAN), Numer zespolu 14, sygnatura 928, kartka 163, 165, 166). Pastor from the village of Hordynia in Sambir region – Fr. Theophilus Chaikovsky was accused of treason because of “public mourning near the church in Kropyvnyky, that a Ruthenian has no right to participate in elections to the Senate and the Sejm of Poland”. The priest insisted that “Poland had no right to force the Ukrainians to vote, because Małopolska in the East is Ukraine and must be joined to Greater Ukraine”. Soon the priest was accused at the district criminal court in Sambir (AAN, nr. zesp. 14, sygn. 928, k. 125). It happened that supporters of the election boycott posted anti-election campaigns on bulletin boards near churches (Church in the village of Oleksychi near Dashava, Stryi County). Excusing himself,

the local priest, who was the head of the election commission in Dashava, said that he was “afraid of being abused” by his (priest’s) fold (SAIFR, f. 2, d. 1, c. 128, pp. 15, 16, 16v.).

The Greek Catholic Father Viktor Lapychak delivered anti-election speeches at the “Prosvita” branch in the village of Sukha Volia, near Lubaczów (nowadays – the Republic of Poland). Andriy Bentsin, the dean-father from Staryi Sambir, Sokal County, insisted that the Ukrainians not sign election letters, threatening that the signatories would be threatened with “revenge by insurgents members”. Fathers Mykhailo Stasyshyn, a parish priest from Horyntsi, and Hryhoriy Shchyryba, a parish priest from Tymtsi, in Liubachiv region called the Ukrainians who were ready to take part in the voting “traitors to the Ukrainian people” (AAN, nr. zesp. 14, sygn. 928, k. 147). Father-chamberlain Stefan Horodetsky urged the Ukrainians not to take part in the elections during the speech at the People’s Chamber, which took place in Rohatyn on September 13, 1922 (Polski wybory, 1922).

A number of priests (Fr. Kypriyan Yasenysky – parish priest in Zhovtantsi, Zhovkva district, Fr. Semen Spitzer – parish priest in Solukov, Dolyna district, Fr. Ivan Shlemkevych – parish priest of Snovidov, Buchach district, Fr. Theodosius Hrynyk – parish priest in Sokolivka, Bobretsk district, Fr. Konstantin Konchevych – pastor in Holohory, Zolochiv district, Fr. Mykhailo Osadtsa – pastor in Khodachkiv Malym – Ternopil district) and the others voluntarily resigned from the members of election commissions (Polski wybory, 1922, p. 2).

This position of the majority of the Greek Catholic clergy caused serious concern to the Polish government agencies, which, apparently, on the contrary in the elections to the Sejm and the Senate, in November of 1922, hoped to use the authority of the priests of the GCC among the people. The authorities hoped that the negation of the clergy concerning holding the census of 1921 in Galicia had passed and that the majority of clergymen of the Eastern Rite would be able to become law-abiding citizens of the Polish state. Some priests were even invited to become members of polling stations. However, these were supposed to be fathers who did not “betray their position” and did not compromise themselves with anti-government work during previous years. The Polish secret services were tasked with monitoring the activities of the Greek Catholic clergy for their “political commitment” and attitude toward the Polish state. This fact is evidenced by the correspondence between senior officials from the Ministry of Religious and Public Education and the Ministry of the Interior with local authorities, including Lviv and Stanislaviv voivodes.

A separate mission to promote the elections of 1922 in Galicia was assigned by the Polish authorities to the highest clergy, Bishop Josaphat Kotsilowski of Przemyśl and, especially to Bishop Hryhoriy Khomyshyn of Stanislaviv, who at that time gained the reputation of a profound clergyman concerning his attitude to Poland. According to the high-ranking Polish officials, the Ukrainian bishops should have encouraged ordinary clergy to be priests, not politicians, not to “hide behind the epitrachel” and under the guise of “burial on the graves of the dead souls” to make speeches on politics (AAN, nr. zesp. 14, sygn. 451, k. 269, 272, 288, 302) (it was plausible to talk about the traditional for interwar Stanislaviv march of the Ukrainian community of the city and surrounding villages to the city cemetery and services at the graves for the dead soldiers of the UGA. – *the authors*). According to government officials, the leaders of the GCC must support the Polish state, because owing to the latter the church is “strong in economic terms” and has reasonable benefits (AAN, nr.zesp. 14, sygn.450, k. 181, 182–186, 219–222, 228, 284–289).

High-ranking ministers were concerned that priests became anti-Polish who were not selected by competition but were ordained bishops “from above”. At the same time,

voivodship officials complained that they did not have the leverage to influence the situation because a concordat was needed (*the concordat between the Polish state and the Church is known to have been signed only in February of 1925*. – the authors).

The Polish officials stated that the Ukrainian public environment is in a dire need of “healthy forces that can be relied on” and that the Ukrainian public is “obsessed with nationalism”. The Polish authorities were concerned that the heart of nationalism “became St. Yura”, which administratively persuades some Greek Catholic priests who are tolerant for the Polish government to “sharpen their spears”. According to officials, the absence of Metropolitan A. Sheptytsky in Galicia (during the years of 1921 – 1923, the head of the GCC travelled to Europe and America to address a number of important church, religious and socio-political issues) did not solve the problems, because he raised the generation of clergy in an anti-Polish spirit. Priests are “not weak in the tongue and strong in the fist”, and are against the Polish authorities – it was stated in the correspondence.

Numerous archival documents testify that during October of 1922, the Polish secret services significantly revived their work in investigating the public and clerical activities of the Greek Catholic clergy. The police monitored the fathers, who had gained a reputation as “politically unreliable” for the period: showed an active civil position during the Polish-Ukrainian war, were chaplains of the Ukrainian Galician Army, refused to worship for the Polish government, to correspond in Polish, and etc. Priests suspected of anti-Polishness were subjected to various persecutions and repressions by the Polish law enforcement agencies.

Authorities tried to remove such persons from the position of pastors (Father Volodymyr Sterniuk was removed from the position of parish priest of Pustomyty due to suspicion of the anti-Polish activities) (SALR, f. 1, d. 14, c. 1030, p. 110). There was a search for graduates of the Greek Catholic seminaries, palamars, who carried out sabotage against the Polish government in the autumn of 1922, (Petro Bilinsky from Mykulychyn was persecuted for this very reason) (SALR, f. 1, d. 14, c. 1552, p. 22).

The Polish special services often imposed fines on priests who voluntarily resigned from election commissions (Vasyl Duba, the parish priest of Lesivka from Stryi region, who paid 60 000 Polish marks (mkp), was punished. Tadei Halkevych from Holovetsko-Skoliv County paid a similar amount of the fine; Father Yulian Halkevych from Rozhanka Verkhnia – 20 000 Polish marks (mkp); Yevhen Chubaty from Svarychev in Dolyna region – a fine of 80 000 Polish marks (mkp) (CSHAUL, f. 408, d. 1, c. 47, pp. 43, 44; Dilo, 1922). Father Dr. Volodymyr Pellikh from Radekhiv was fined for not “recognizing himself as a Polish citizen” and, according to the words of the Polish authorities, was “an enemy of Poland”. Dozens of the Greek Catholic priests were fined on similar charges (SAIFR, f. 231, d. 1, c. 295, p. 82).

It happened that the Polish police, looking for compromising literature, books, magazines, photographs, conducted searches in the houses of the clergy, carried out audits in the Greek Catholic churches, monasteries, etc. Father Dmytro Shulia, the parish priest of the village of Bilka in Peremyshliansky region, was soon interned due to the availability of such literature (Archiwum Panstwowew Krakowie (APK), nr. zesp. 217, sygn. 23, k. 44). During the search in the house of Father Josyp Marynowicz from Huisko (nowadays Novi Sad – the Republic of Poland), on October 29, 1922, in the village of Kalvaria-Patslavaska, where he was the pastor, a number of materials were found (correspondence with the consistory of the GCC in Lviv, documents supporting the Ukrainian cooperation, the book “True to him”) which, according to the Polish police, testified to the anti-Polish attitude of Fr. Josyp Marynowicz. The priest was eventually arrested in Dobromyl (AAN, nr. zesp. 14, sygn. 928, k. 132).

A demonstrative search was conducted by the Polish gendarmes on October 23, 1922 in the Greek Catholic Church in the village of Myszkowice, Lesko County (nowadays – the Republic of Poland) on suspicion of the anti-Polish agitation (AAN, nr. zesp. 14, sygn. 928, k. 125). Soon the pastor of the church, a fifty-two-year-old Fr. Dmytro Chertezhynsky was arrested. Father Mykola Hoshovsky – a pastor of the village Falish near Stryi was robbed and later arrested because on election day, November 5, 1922, he conducted liturgy instead of participating in the vote and agitating the faithful. Father Vasyl Hlibovytsky from the village of Jabie-Ilci (nowadays – Verkhovyna) was looted by the Polish uhlans (hay was burned, mantle was stolen) because during the sermon in the Church he allowed himself to arbitrarily interpret the Fourth Commandment of the God (accused the Ukrainians who do not love their motherland, in “betrayal of the native land”) (Dilo, 1922). There are known cases of searches by the Polish police in the Greek Catholic monasteries in Zolochiv, Yavoriv (CSHAUL, f. 408, d. 1, c. 47, pp. 46, 47).

The arrests of the Greek Catholic priests for their active citizenship during the election of 1922 soon became widespread. Dozens of priests from different parts of Galicia were arrested. In particular, well-known fathers were arrested: Omelian Kovch from Przemyśl, Ivan Fedevych – a catechist from Turka, Yulian Herasymovych from Kosovo, Petro Babyn from Drohobych, Hryhoriy Moroz from Borynia, Turkiv district, Mykhailo Hanushevsky from Dora, Oleksa Lutsiv from Mykulychyn, a father of ChSVV Severyn Baranyk from Zhovkva, Andriy Strilchuk from the village of Strilche from Horodenkivshchyna (CSHAUL, f. 408, d. 1, c. 47, pp. 4; Dilo, 1922) and the others. In total, 76 priests and 2 theologians were arrested for anti-election campaigning in October – November of 1922 (CSHAUL, f. 408, d. 1, c. 47, pp. 11, 41, 42, 49–50).

Only a small part of the Greek Catholic clergy supported the pro-government Ukrainian Farmers' Party (UCP), led by Mykola Ilkiv, a priest from the village of Babyn (nowadays – the village of Seredniy Babyn in Kalush district) who was punished by a church court (Deliatynskyi, 2002; Dilo, 1922, p. 3). With the support of the negotiating forces, the Polish administration sought to increase the number of people seeking to take part in the elections. The Polish magazines “Gazeta poranna”, “Kurjer Lwowski”, “Gazeta Lwowska” and the others periodically included lobbyist information about the above-mentioned priest Mykola Ilkiv and Father Tokar, who “showed understanding of the situation and will vote in the election” (Jak Podhajce broniły się przedbandą, 1922, p. 3; Dalszy pochód bandy opryszków, 1919, p. 1). The Polish authorities tried to help those who were “prisoners” of Father Ilkiv’s activities and the Ukrainian Farmers' Party (Onufriy Tsylnyk, a native of the village of Trudovach in Zolochiv region who was a former Ukrainian army officer released from Kalisz prisoner-of-war camp, could count on the administration’s dividends) (SATR, f. 231, d. 1, c. 7, p. 40). Conversely, opponents of the “farmers” policy were at risk of persecution by the authorities (AAN, nr. zesp. 14, sygn. 928, k. 191).

Correspondence between the Polish government officials suggests that the Polish landowners were to provide material support to the pro-Polish forces among the Ukrainian politicians. The thesis that the Polish lords could support pro-Polish Ukrainian candidates financially for parliament is also indirectly confirmed by the information which was periodically published by the Ukrainian magazine “Dilo” during the period of September – October of 1922. Father Mykola Ilkiv was described by “Dilo” correspondents as “the protagonist of Count Viktor Rozvadovsky” (Masovi trusy, 1922). The Polish landowner from the village of Troitsa, Sniatyn County, Dobyk, was ready to support the Ukrainians financially who will go to the polls during the Polish elections (Dilo, 1922).

Fr. Ilkiv's personality became another "stumbling block" between the Ukrainian and Polish periodicals during the autumn of 1922. The magazine "Dilo" compromised the priest in the eyes of the Ukrainian public, covering some controversial episodes of father's election activities (Masovi trusy, 1922). The Polish periodicals supported Farther M. Ilkiv (Jak Podhaj ce broniliysie przedbandą, 1922, p. 3; Dalszy pochód bandy opryszków, 1922, p. 1). The Polish press also set an example for the Ukrainians of certain Polish priests (Fr. Okunia, Fr. Lutoslavsky), who agitated the faithful to participate in the elections of 1922 and did not forbid them to vote (Nadzieje wyborcze posła ks. Okonia, 1922, p. 3; Sytuacja przedwyborcza, 1922, p. 1).

The Greek Catholic parishes in Bibrka, Dobromyl, Drohobych, Chisan, Bereziv, Yaroslav, Yavoriv, Mostyska, Rudky, and Rava Ruska were criticized by the Polish magazines correspondents, where priests sabotaged the elections (Zakaz sabotowania wyborów 1922, p. 4). Instead, the Polish press called the Ukrainian national movement nothing more than "bandy opryszków", "morderstwo", "terror ruskiy", "mord ukraińskiy", and etc. The Polish magazines noted that the clergy in Kresy did not fulfill their duty – did not interfere with the sabotage of "the Rusky khlop", and supporters of the Polish-Ukrainian agreement are in the minority (Sytuacja w Małopolsce Wschodnie niezmieniona, 1922, p. 2; Dalszy pochód bandy opryszków, 1922, p. 1).

The majority of the clergy of the GCC and supporters of the normalization of the Ukrainian-Polish relations S. Tomaszowski and Bishop H. Khomyshyn dissociated themselves from the "negotiators" sharply (CSHAUL, f. 408, d. 1, c. 1205, pp. 1, 2). On November 5, 1922, Bishop H. Khomyshyn of Stanislaviv, together with representatives of the GCC and the Ukrainian politicians, signed a joint appeal "To the Whole Cultural World". The appeal drew attention to the anti-Ukrainian policy of the Polish authorities (Svoboda, 1922, p. 1).

The elections to the Sejm and the Senate were held according to the appointed date – November 5 and 12, 1922. According to the above-mentioned historian Oleksandr Zaitsev, only 38.2% of voters in Eastern Galicia took part in the elections to the Sejm, to the Senate – 35.3% (For comparison: in ethnically Polish voivodships people voted from 68 to 87%). The lowest percentage of voters in the elections to the Sejm was in Sniatyn County (18.7%), the highest – in Turka County (61.7%). In the city of Lviv, by the way, 57.1% took part in the elections. A comparison of these data with the ethnic composition of the region's inhabitants (over 60% of the Ukrainians) shows that the vast majority of the Ukrainian population avoided participating in the elections (Zaitsev, 1999).

**The Conclusions.** Thus, the socio-political position of the Greek Catholic clergy during the election was in solidarity with the majority of the Ukrainian population – strongly to boycott the elections to the Sejm and the Senate on November 5 and 12, 1922, respectively. The Ukrainians in Galicia and the Ukrainian clergy did not consider themselves citizens of the Polish state, hoping to restore their own statehood in the future. The repression of the priests by the Polish police before and after the elections did not prevent them from changing their position.

The presence of a small group of the Greek Catholic priests in support of cooperation with the Polish state did not deepen the division of the clergy. Gradually the "negotiators" found themselves in isolation and were boycotted by the entire Ukrainian public. The Polish government's support for the agreement group only compromised them in the eyes of the Galician-Ukrainian society.

In general, the elections of 1922 did not live up to the government's expectations and showed that the Polish rule in Western Ukraine was maintained only by administrative

resources and military force. The boycott of the parliamentary elections of 1922 by the Ukrainian population of Galicia thwarted the Polish government's plans to create the appearance of "voluntary accession" to the region, demonstrating that the majority of its inhabitants did not recognize the legitimacy of the Polish rule. The Greek Catholic Church, with its consistent position, reaffirmed the reputation of the national Church.

On the other hand, modern geopolitical realities in Eastern Europe require consolidation under Ukrainian and Polish partners, because the slogan – "without an independent Ukraine there is no independent Poland" as never seems relevant today (Doroshko & Matviyenko, 2021; Reient & Velykochyi, 2020). Due to these circumstances, the problem we have proposed above is not without a certain historical didactics.

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**THE POLISH STATE DURING THE INTERWAR PERIOD IN FRANCISK BUJAK’S VIEWS (BASED ON THE MAGAZINE “WIEŚ I PAŃSTWO”, 1938 – 1939)**

**Abstract.** *The purpose of the study is to elucidate the specifics of Franciszek Bujak’s views on the Polish state functioning during the interwar period – the founder of the Lviv School of Socio-Economic History. The research methodology is based on the principles of historicism, systematicity, scientificity, verification, authorial objectivity, moderate narrative constructivism, as well as the use of general scientific (analysis, synthesis, generalization), special and historical (historical and genetic, historical and typological, historical and systemic) methods. The scientific novelty consists in the reconstruction of F. Bujak’s views on the peculiarities of state-building processes in the Second Polish-Lithuanian Commonwealth. The Conclusions.* Franciszek Bujak, the founder of the Polish School of Socio-Economic History, one of the most authoritative researchers of interwar Poland, left behind not only scientific but also journalistic heritage. An active participant in the “intellectual” competition for the

restoration of historical Poland, in particular as a consultant at the Paris Peace Conference, F. Bujak had even some experience in politics as the Minister of Agriculture. He witnessed the formation and transformation of the political system of the Second Polish-Lithuanian Commonwealth, and witnessing influenced his interests and was reflected in his scientific and journalistic work.

F. Bujak, a native of a peasant family and a longtime member of "the People's Party", paid special attention to the problems of the state's relations with peasants, the most numerous social stratum of that time. Considering the state as the highest degree of social organization based on coercion, he advocated harmonization through solidarity. F. Bujak interpreted solidarity as the best model of state organization, believing that solidarity of society members is the primary and determining factor in the state success.

Reflecting on the social order in interwar Poland, sandwiched between two totalitarianisms – Bolshevik and fascist – F. Bujak paid attention to the peculiar "Polish totalitarianism" of J. Piłsudski, in which there was preserved the appearance of democracy. The researcher considered "classical" totalitarianism impossible in Poland due to the incredible diversity of the Polish society. As for the latter, F. Bujak was mostly interested in issues related to the peasantry, which he considered not only the economic but also spiritual basis of the state. The researcher considered the problems of the peasantry in opposition to the nobility as a privileged part of society, which also underwent significant transformations. In this context, one of the urgent tasks he considered overcoming the prejudices of the state towards the peasants and the peasants towards the state. The latter, in his opinion, was possible only by raising the educational and cultural level of the peasantry.

**Key words:** Rzeczpospolita II, state, scientific press, magazine "Wieś i Państwo", Polish historiography.

## ПОЛЬСЬКА ДЕРЖАВА МІЖВОЄННОГО ПЕРІОДУ В ОЦІНКАХ ФРАНЦІШЕКА БУЯКА (ЗА МАТЕРІАЛАМИ ЧАСОПISУ "WIEŚ I PAŃSTWO", 1938 – 1939)

**Мета дослідження** – розкрити специфіку поглядів на питання функціонування польської держави міжвоєнного періоду Францішека Буяка – творця львівської соціально-економічної історичної школи. **Методологія дослідження** ґрунтується на принципах історизму, системності, науковості, верифікації, авторської об'єктивності, поміркованого нарративного конструктивізму, а також на використанні загальнонаукових (аналіз, синтез, узагальнення) та спеціально-історичних (історико-генетичний, історико-типологічний, історико-системний) методів. **Наукова новизна** полягає у реконструюванні поглядів Ф. Буяка на особливості державотворчих процесів у II Речі Посполитій. **Висновки.** Францішек Буяк, засновник польської школи соціально-економічної історії, один з найбільш авторитетних дослідників міжвоєнної Польщі, залишив по собі не лише наукову, а й публіцистичну спадщину. Активний учасник "інтелектуальних" змагань за відновлення історичної Польщі, зокрема як консультант на Паризькій мирній конференції, Ф. Буяк навіть мав досвід політичної діяльності як міністр сільськогосподарства. На його очах відбувалося становлення і трансформація політичної системи II Речі Посполитої, і це впливало на його зацікавленості та відображалося у науковій і публіцистичній творчості.

Виходець з селянської родини, багатолітній член "Стронництва людowego", Ф. Буяк звертав особливу увагу на проблеми взаємин держави із селянами – найбільш чисельною тогочасною суспільною верствою. Розглядаючи державу як вищий ступінь суспільної організації, заснованої на примусі, ратував за гармонізацію цього шляхом солідаризації. Ф. Буяк трактував солідаризм як найкращу модель державної організації, вважаючи, що саме солідарність членів суспільства є первинним та визначальним фактором успішності держави.

Роздумуючи про суспільний устрій міжвоєнної Польщі, затиснутої між двома тоталітаризмами – більшовицьким та фашистським – Ф. Буяк приділяв увагу своєрідному "польському тоталітаризму" Й. Пісудського, при якому зберігалася видимість демократії. Дослідник уважав неможливим у Польщі "класичний" тоталітаризм через неймовірну строкатість польського суспільства. Що стосується останнього, то найбільше Ф. Буяка цікавили питання, пов'язані з селянською верствою, яку він вважав не лише економічною,

а й духовною основою держави. Проблеми селянства дослідник розглядав у опозиції до шляхти як привілейованої частини суспільства, що також переживала значні трансформації. У цьому контексті одним із нагальних завдань називав подолання упереджень держави до селян та селян до держави. Останнє, на його думку, було можливим лише завдяки підвищенню освітнього і культурного рівня селянської верстви.

**Ключові слова:** II Річ Посполита, держава, наукова преса, часопис “*Więś i Państwo*”, польська історіографія.

**The Problem Statement.** Franciszek Bujak – a historian, intellectual, active participant in the state-building processes in interwar Poland, is considered one of the most famous researchers of that period, after all, his name is associated with the creation of a new historical discipline. He witnessed and participated in the creation, formation and development of the Second Commonwealth – a European state with significant historical traditions and all the problems inherent in the newly created state. Analyzing the issue of these topics comprehension by F. Bujak in the pages of the specialized scientific and journalistic magazine “*Więś i Państwo*”, we reconstruct the researcher’s views on the state-building problems of Poland during the interwar period.

**The Analysis of Sources and Recent Researches.** The study of the scientific activity of the founder of the first Polish School of Socio-Economic History has its own tradition, dating back to the 60–70s of the XXth century, and is so diverse that it deserves a separate study. The first attempts to evaluate the work of F. Bujak were made by Ye. Topolski in the context of understanding the scientific achievements of one of his students and colleagues – Roman Grodetsky (Topolski, 1963, pp. 56–76), and V. Kula, analyzing issues about the problems and methods of economic history (Kula, 1963). In Polish historiography these attempts gave rise to the first discussions on the theoretical and methodological foundations of the scientific work of F. Bujak (Madurowicz-Urbanska, 1976, pp. 37–170) and initiated attempts to analyze the problem holistically (Grabski, 1976, pp. 101–124).

Notable, in the context of the time of its appearance, was the work of A. K. Shelton, American researcher, dedicated to F. Bujak as a bearer of the democratic idea in Polish historiography (Shelton, 1989). The next wave of interest in F. Bujak’s personality and his scientific work happened at the beginning of a new millennium, which was presented in the project “Multicultural Historical Environment of Lviv” (Budzyński, 2004, pp. 309–328, Wójcik-Łagan, 2007, pp. 500–510), the “Golden Book of Lviv Historians” was the result of project work (Budzyński, 2007, pp. 421–440). In 2009 the monograph was published on the life and work of F. Bujak (Szafranec, 2009).

In addition, some aspects of F. Bujak’s activity aroused the interest of researchers: his scientific and pedagogical work (Wójcik-Łagan, 2007, pp. 500–510; Hrytsak, 2014; Yureiko, 2019, pp. 461–477), formation of socio-economic history as a discipline at Lviv University during the interwar period (Sroka, 2015, pp. 651–653), research of the history of socio-economic studies in the pages of the Polish scientific press at the beginning of the XXth century (Lazurko & Shcherban, 2020, p. 46–53). It is worth noting the emergence of source publications on personal and scientific relations of F. Bujak (Pisulińska, 2020, pp. 361–397). In the researches there were also reflected some aspects of studying of F. Bujak’s activities such as: an initiator of various publishing projects (Franaszek, 2000, pp. 37–46), a supporter and one of the ideologues of agrarianism in Poland (Kowalczyk, 2016, pp. 85–98), a critique of the Polish agrarian policy during the interwar period (Baran & Sypko, 2019, pp. 89–102).

However, taking into consideration the scale of the scientific achievements of F. Bujak, his active social and political position, many issues still need elaboration. One of such issues is

F. Bujak's understanding of formation and development problems of the restored Polish state during the interwar period. This issue is of great interest to us, because nowadays Ukraine is now in a similar situation of state development.

**The Purpose of the Research.** Reconstruction of F. Bujak's views on the peculiarities of state-building processes in the restored (and, in fact, newly created) country – the Second Polish-Lithuanian Commonwealth.

**The Results of the Research.** In 1920, agreeing to move to Lviv at the invitation of the then dean of the Department of Philosophy and his longtime friend S. Zakshevsky, F. Bujak wrote to him: "It's about time and peace for work, I hope that in this regard, the Department of Philosophy will treat me kindly and with understanding. So in advance, I decided not to take up any public work, let alone political" (Pisulińska, 2019, p. 378). Thus, started the founder of the Lviv School of Socio-Economic History, later known in Europe and equated, in scope, including publishing, to the French School of the *Annales* (Zamorski, 2020, p. 73). F. Bujak wanted to have a half-year leave and asked: "As for the seminar, I would like to avoid the hassle of organizing it, I would gladly agree to accept me for a seminar on the history of Poland, so I don't have to buy and create a separate library" (Pisulińska, 2019, p. 379). Apparently he had a hard time the year he spent in Warsaw before moving to Lviv, where he did not make a political career (he was the Minister of Agriculture in the government of V. Grabsky for one month only), and did not like teaching at the local university and the Higher School of Commerce.

Lviv seemed to F. Bujak a great location for a quiet continuation of his scientific career. In September of 1920, by the rescript of the Head of State (at the request of the rector) F. Bujak was appointed the head of the Department of Socio-Economic History created for him at Lviv University specially. Due to the circumstances, he was able to take up his duties only at the beginning of 1921, but the activity exceeded all possible expectations and did not fit into F. Bujak's idea of quiet work at the periphery. Ten years later, the Department, which from the very beginning, in addition to the usual classes and scientific and publishing activities, was transformed into the Institute of Socio-Economic History. The main reason for this transformation was the "specificity" of F. Bujak's school – a combination of scientific and didactic work: students received feasible research tasks at the first classes (Budzyński, 2004, p. 316), the best of which were published.

To implement publishing, in 1925 F. Bujak founded the publishing series "Studies in Social and Economic History", which represented the main directions of scientific work of the department and in which there were published research results of his students and colleagues. Taking into consideration what was done in a relatively short time – less than a decade – this first large-scale project of F. Bujak was very successful. In 1931 this success enabled F. Bujak and J. Rutkowski to dare to create a specialized magazine "Annals of Social and Economic History" ("Roczniki Dziejów Społecznych i Gospodarczych"), aiming at socio-economic history, and later to launch another publishing series "Library of History and Culture of Village" (1936) and another magazine "Wieś i Państwo" ("Village and State") (1938). The latter became a kind of tribune, expressing F. Bujak's position and his associates on the issues of possible forming relations between the "agrarian state with its own largest social group – the peasants" (Baran & Sypko, 2019, p. 91).

Creating a specialized magazine "Wieś i Państwo" in 1938, its authors remarked: "To resist this situation [it was about the antagonism of the state and the peasantry, which intensified during the strikes of 1937 – L. Lazaruko] and call for the cooperation of all those who feel

responsible for the fate of Poland, those who want and know how to work for its growth and future” (Od wydawnictwa, 1938, N1, p. 1). The pages of the magazine were opened to discuss the ways to achieve this cooperation through the study of the mutual importance of the village and the state, mutual rights and responsibilities, to avoid crises. Announcing the basis of their own activities, the authors of the publication emphasized the need for truthful coverage of current issues, based on verified facts, statistics, sociological analysis and trying to compare everything with similar processes in the world.

In form it was a monthly magazine and during the year of 1938 10 of its issues were published. The following year, by September, they had published six issues. The issues were quite voluminous – up to 80 pages each and contained the following sections: more than half of the content was occupied by “research and articles”, the rest – “reviews”, “chronicle”, “reports”, “bibliography”. The published materials were not only scientific from a formal point of view (taking into account the applied scientific apparatus), but first of all from the point of view of “spirit and content”. At the same time, outlining the direction of the publication, it was noted that it was aimed at not only specialists but also at a wide range of people who were interested in these issues.

In a political sense, the magazine took a neutral position: “Our magazine will focus on the creation and dissemination of the programme of the Polish countryside in all directions and consideration of methods of work on a rural development” (Od wydawnictwa, 1938, p. 3). Actually, this project was about practical goals. At that time in Poland there were already two state institutions of theoretical orientation: “Institute of Rural Culture” and “Institute of Rural Sociology”, which developed their own publishing activities and were focused on research activities. Instead, this magazine was to function as a mediator between theory and practice, between scientific knowledge and the application of its results in life.

F. Bujak wrote on rural and agricultural topics since the beginning of his scientific career, which was probably influenced by his own rural origin. His journalistic activity became much more active at the beginning of World War I. F. Bujak saw his civic duty in social activities aimed at raising the level of education and justifying the need to change the existing economic system. As it was mentioned above, his effective participation in the political life of the Polish state after independence was not very successful. F. Bujak was a supporter of democracy and social equality, being a member of the national camp for a while, after the rise of nationalist sentiment there, he left the ranks. And already during the period of independence he joined the Polish People’s (Peasants’) Party “Piast” (Polskie Stronnictwo Ludowe “Piast”), which in 1931 transformed into the People’s Party (“Stronnictwo Ludowe”) (Budzyński, 2007, p. 429).

In a series of essays published in the pages of this magazine, F. Bujak described the young Polish state of the interwar period and reflected on the gains, losses and prospects of its development. The first issue began with a kind of programme article by F. Bujak, which was called, like the magazine itself, “Village and State” (Bujak, 1938, N1, pp. 5–12). In four points the author outlined the importance of the village in the Polish state formation and development. Focusing on the “new times of totalitarianism” that swept Poland after the May coup of 1926 and the introduction of the policy of reorganization, he noted that this was not the first and obviously not the last wave of confrontation between the state and the individual.

In this essay, F. Bujak interpreted the state as “the highest organization of human societies, based on coercion and encompassing all people living in its territory” (Bujak, 1938, N1, p. 5). In his opinion, this happened historically. Only the volume and intensity of state activity

changed, as well as the set of measures used by it, as it always depended on the level of culture and goals set by the state (more precisely, a group of people in power).

Thus, in the issue of relations between the state and citizens, the state and the individual were, in his opinion, “doomed to coexistence, mutually supporting each other and mutually dependent on each other” (Bujak, 1938, N1, p. 5). The most difficult, and therefore dramatic item in this process was always the search of balance, a fair finding of the boundaries of interdependence, and the difficulty of respecting them.

Trying to justify what had said, the author presented his vision of the state formation from ancient times, with special emphasis on the attitude of the state to the village, i.e., to a group of small farmers who lived in the village and represented a separate form of settlement in Poland. Analyzing the issue of the state formation, he began with the question of what the oldest socio-political institution was – the village or the state. According to the author, the village was the oldest form of a social organization: “Once the state was as small as the village, and the village was the state – a prototype of the state” (Bujak, 1938, N1, p. 6). According to the researcher, such pre-state formations were characteristic of the Paleolithic, when settlements had their own defined territory, their own government (council of elders), which regulated relations with the world of nature (through beliefs), relations within the community (through a system of prohibitions) and external relations (interacting with other communities). The complication of this system led to the separation of the monopoly way of governing and the emergence of a hierarchical social structure.

According to F. Bujak, the mechanism of the state formation was “the forced unification of villages, which continued to preserve their original structure and way of life... But after thousands of years of the state existence and its cultural development, the village did not cease to exist in its original form” (Bujak, 1938, N1, p. 7). The specificity of Poland as the state was that it followed this path a little later than the countries formed in the lands of the Roman Empire. In other respects, everything was similar: the upper classes (the gentry) were also replenished with newcomers from foreign lands and from their own rural population, which also became a replenishment source of artisans and merchants.

Trying to emphasize the importance of the peasantry for the state, F. Bujak noted that in the Middle Ages the peasantry representatives were also actively involved in the defense of the Polish state. Later, they formed the basis of the commonwealth nobility, which included village elders, and in modern times the infantry from the peasants of the royal villages joined the mercenary army. In addition, at all times the army was supported by taxes paid by ordinary, common people. The last attempt to involve these “silent witnesses” of the Second Polish-Lithuanian Commonwealth decay into the affairs of the state, as F. Bujak noted, was the participation of peasants (cossins) in the uprising of T. Kościuszko. Characterizing the situation of the XIXth century the researcher wrote: “It is a pity and sad to mention the importance of the passivity of the peasants for the restoration of Poland’s independence, the reason for which was the reluctance of the nobility to lose their privileges and recognize the peasants as owners of their land” (Bujak, 1938, N1, p. 7).

F. Bujak paid special attention to the importance of preserving the Polish national culture during the period of statelessness. In his opinion, the peasants were the elements that preserved the language and religion (thus preventing the process of “erosion” of the ethnic group) and folklore – the basis of a national culture. And characterizing the contemporary period, he argued that “the condition for the preservation of the Polish state is to raise the culture of the masses in order to reduce the gap between ordinary people and the educated

class, between the ideals of the people and the ideals of the intelligentsia, because the latter were based on the historical noble tradition” (Bujak, 1938, N1, pp. 10–11). Therefore, the greatest internal threat to interwar Poland, in his opinion, was the lack of a national solidarity between the two parts of the people. Since F. Bujak interpreted solidarity as the best model of a social organization, it was the solidarity of society members that he proclaimed the primary and determining factor in a public life. And the shortest way to achieve social solidarity, which could increase the state’s defense capabilities and the functionality of its apparatus, he considered the rise of education of the masses.

In accordance with the ideology of solidarity, F. Bujak considered justified the need for the state regulation, the existence of socially significant laws, various voluntary associations, and etc. more. In this context, he considered one of the urgent tasks to change the attitude of the peasant masses to the state and the state to the peasants – in order to achieve solidarity. Indicative in this sense is his statement: the Poles without peasants cannot be considered people” (Bujak, 1938, N1, p. 11). After all, even from an economic point of view, the main breadwinner of the population of interwar Poland were peasants – small landowners, who accounted for 75% of the country’s population. But governments which kaleidoscopically changed during the 20–30’s of the XX century, managed to organize an agrarian reform (after the failed one in 1920) until 1925, but its main provisions were very contradictory (Baran, Sypko, 2019, pp. 89–102).

The issue of solidarity realization through the involvement of peasants in joint work for the benefit of the state became especially acute in the 1930s of the XXth century – before the threat of war and the possible re-loss of Poland’s independence. In this regard, F. Bujak wrote: “If the nobility in the past could not maintain independence, then even more at present there can be no question of maintaining independence by the state, which pushes away the majority of the population, which plays the most important role in its body” (Bujak, 1938, N1, p. 11).

Another issue, in addition to the problems of forming a solidary basis for the functioning of the Polish state, which attracted F. Buyak’s attention was the issue of a political system. In the article “Village and Totalitarianism” F. Bujak expressed his vision of this problem, in his opinion, the most topical problem at that time (Bujak, 1938, N2, p. 88). The importance of this issue grew due to the fact that in the 30’s of the XXth century Poland still faced the problem of choosing the road it had to take. Therefore, the researcher focused on the sources of totalitarian ideas, ways to implement them in the modern world and the prospects for implementation in Poland.

According to F. Bujak, the main sources of topical totalitarian ideas were: Marxism, whose supporters aimed to change the social order in the world in a revolutionary way and World War I, which led to profound changes in the economic, social and political life of many European countries. F. Bujak stated that socialism and the dictatorship of the proletariat in Russia became possible as a result of the war, and fascism in Italy, National Socialism in Germany (as well as similar systems in other European countries) appeared in opposition to this Bolshevik socialism. Mussolini and Hitler came to power using the contradictions of the existing systems in their countries and the unprecedented propaganda of their own ideas. According to F. Bujak in Poland, the feeling of the need for a strong leader stemmed from external and internal threats (and not without the influence of Mussolini’s success) and emerged when it became clear that coalition governments could not assure the state security and sustainable development.

Then, first R. Dmowski and V. Vitos began to advocate for strong power, and later in May of 1926 J. Piłsudski carried out a coup d'état. As a result, the democratic state system was seemingly preserved, but J. Piłsudski remained a dictator until the end of his life, subordinating the army and foreign policy and influencing through his protégés to resolve all issues of domestic life (Pobóg-Malinowski, 1956; *Wielka historia Polski: 1918 – 1939*, 2000). An interesting description of these processes as “inevitable” is found in the monograph of N. Davis: “A society in which two-thirds of the population lived on subsistence agriculture and one-third consisted of national minorities could hardly afford the liberal atmosphere of a gradual change characteristic of wealthy and stable Western countries” (Davis, 2008, p. 752). Nor did it seem that F. Bujak was particularly “upset” by this “Polish” totalitarian way (which, apparently, he did not consider quite real), different from the Italian and German. It is also interesting that the researcher believed that the ground was not very favourable for “Marxist” type of totalitarianism in Poland. But the post-World War II situation “plowed” the soil of many Eastern European countries.

F. Bujak was also interested in the implementation of totalitarianism, its implementation in the state practice. According to the researcher, this happened in “a network” way: “the enthusiasm and outrageous energy of the creators of totalitarianism in Italy and Germany... spread through a network of supporters and then captured the masses” (Bujak, 1938, N2, pp. 90–91). F. Bujak, a supporter of the “new history”, used to take into account socio-psychological factors in the historical process (Grabski, 2000, p. 116) and he said that masses of people were taken into “a mental captivity”. Propaganda, well-trained supporters, a leader, gaining (or seizing) power, establishing a one-party system and subordinating the entire system of the state power – this is the way in which totalitarianism captured nations. Instead, in Poland, everything was different – a secret preparation for a coup, which took the form of re-subordination of troops to the Head of the state. Without propaganda, without creation of a corporate system (except for “Piłsudski’s colonels”, later – sources of the state administrative resource). That is why, after the death of J. Piłsudski all this “special” totalitarianism fell apart like a house of cards in Poland, in 1935. “This is not surprising”, said F. Bujak, “because without an idea and a leader, people do not understand what to believe in and what to do” (Bujak, 1938, N2, p. 92). On the basis of this fact the researcher concluded that in Poland true totalitarianism could be implemented only the same way as in other European countries: through an ideological movement (based on deep feelings and needs of the people) and in the presence of a charismatic leader who would be passionate about these ideas.

Reflecting on the prospects of totalitarianism in Poland, F. Bujak sincerely thought that this type of the state power had no chance in this country. F. Bujak considered the peculiarities of the Polish society as the main reason for this. He wrote: “Society is difficult to be disciplined, although by nature it is passive and prone to obedience. Among the intelligentsia there are many who are uncritical and who are easy to be bribed with beautiful words, many weak-willed, poor, ready to remain silent... However, all are too different” (Bujak, 1938, N2, p. 93). According to F. Bujak, the only totalitarianism that could be realized in Poland could only be the way it was during the life of J. Piłsudski – a significant moral authority for the majority of citizens.

Therefore, Poland’s prospects in the totalitarian system seemed to him different from the prospects of totalitarianism in Poland. According to F. Bujak, this system did not correspond to the nature of “Polishness”: “In totalitarian system’s frame, totalitarianism will never be fully explained, especially taking into consideration the military needs due to the geographical

location of the country. If public opinion claims that in Italy and Germany, totalitarianism depletes (sterilizes) artistic creativity and weakens a scientific creativity, then we should be even more afraid of it (Bujak, 1938, N2, pp. 93–94). According to F. Bujak, it was necessary to be especially wary of this in the sphere of public administration due to the instability of traditions in the young state, which critically needed professional, not party (loyal) personnel. “After all, F. Bujak noted that in Poland public officials are not very sympathetic to the people anyway, but what will happen if they get an unlimited power?” (Bujak, 1938, N2, p. 93).

Reflecting on the question of totalitarianism in relation to the Polish village, he wrote: “As for the village, it has never created totalitarianism, it is a form of government, which was only imposed on the village... The peasant instinctively feels that totalitarianism brings an increase in duties in favour of the state, economic and political control through increased bureaucracy” (Bujak, 1938, N2, p. 94). All this could be seen on the example of the Soviet Union at the beginning of the 30’s of the XXth century. However, in Poland, according to the data, the official introduction of “its own” totalitarianism, at least at the beginning, did not worsen the situation. But F. Bujak believed that the village should resist totalitarianism, because it had something to lose: “Initially, militarization of the economy leads to its growth, but temporarily. Militarization threatens to restrict civil and political rights and leads to further deterioration of economic, cultural and political life... For example, if magazines for peasants are banned now, in the future only the government press will be published. If even now the elections are quite conditional, in the future they will be nominal” (Bujak, 1938, N2, p. 95).

It is interesting that for F. Bujak totalitarianism – like everything human – is better and worse. He wanted to hope that the Polish totalitarianism, which implied freedom of conscience and religion, freedom of individual organizations, speech and press, was better. But he was also aware that from his point of view (both geographically and temporally) the value of totalitarianism remained unknown. In this regard, F. Bujak wrote: “It [totalitarianism] is still being tested. Some attempts has already ended catastrophically, and the boldest Russian attempt terrifies all mankind and, despite its short duration, threatens catastrophe. A great war is imminent, which will help clarify the situation undoubtedly. Until then, the results of the war will show whether the constitutional and democratic system or totalitarianism, better ensure the existence and future of the state and nation” (Bujak, 1938, N2, p. 95).

Analyzing F. Bujak’s views on the Polish state of the interwar period, one cannot ignore his vision of those transformations which all, and especially the privileged social strata, underwent under new conditions. In the essay “Nobility” F. Bujak focused on the situation of this class representatives in restored Poland (Bujak, 1938, N3, pp. 161–168). To do this, he made an excursion into the history of the concept of “nobility”, emphasizing, first of all, its negative connotations, which began to spread with the emergence of social democratic tendencies in the society (shortly after the defeat of the November Uprising) and were closely associated with the modernization of life at that time. In a broader sense, according to F. Bujak, the concept of “the nobility” included a negative view of the rural population – underestimation of its weight, exclusion from influence on public affairs – i. e., everything that contained harmful aspects to the village, state and its authorities.

The most characteristic feature of the nobility was the social superiority of its representatives. The feeling of superiority over the peasant and the right to rule over him was based on the theory of multi-tribal or even racial origin of the nobility and peasants. “The peasants”, wrote F. Bujak, “are considered inferior, incapable of spiritual development, forced to work and obey”. This vision is similar to and follows from the same source as in

classical antiquity on slaves and barbarians and in the Western European view on colored people nowadays. (Bujak, 1938, N3, p. 164).

But in addition to the negative, F. Bujak emphasized the positive features of the nobility, also represented by highly moral, capable, educated, sacrificial and hardworking people. He also noted that the Polish nobility was characterized by democracy. After all, the role of the nobility in the emergence of democratic currents stemmed from its cultural seniority and the process of a partial declassification under the influence of modern economic conditions. In fact, in his opinion, negativism towards the nobility dominated at the time when its representatives allowed to “shake” a powerful state and voluntarily agreed to the first two divisions of the country.

F. Bujak spoke about these negative features, warning against the elitism of his day, which, like totalitarianism, was harmful to the development of the young Polish state. He saw the greatest harm from the nobility in its one-party rule, which was followed by the slogan “the state is us”. He wrote: “By not allowing the others to rule the state, the magnates actually reduced the dark and economically dependent petty gentry to the role of an instrument in their hands. This resonates perfectly with the modern idea of elitism and with today’s totalitarian tendencies” (Bujak, 1938, N3, p. 166). The researcher interpreted contemporary elite as a sociological (rather than heraldic, tribal) continuation of the former nobility, because of the similarity of defining features, and in this he saw serious threats to the democratic development of the state. However, in response, representatives of the elites accused the supporters of democracy that the lower classes showed the same political shortcomings as the nobility, therefore, they must be deprived of political rights in order to protect the state from the anarchy and disintegration born by the “seimocracy”.

Later, F. Bujak, developing this “noble-peasant” theme, analyzed the issues of comparative assessment of the spiritual traits of these classes representatives (Bujak, 1938, N4, pp. 258–269). That is why, it was about refuting the accusations of some politicians that the involvement of broader social groups in the state-building processes at the beginning of the 20’s of the XXth century brought an element of anarchy no less destructive than the chaos in the activities of the nobility in the Second Polish-Lithuanian Commonwealth.

According to F. Bujak, cultural figures, like politicians, also saw in the representatives of the people elements other than the nobility, namely – the inability to receipt and create culture in the same direction as the higher class did. The researcher noted that such views were the result of the historical cultural distance between the nobility and the people, and long-standing mutual prejudices. Trying to understand this, F. Bujak immersed himself in history, turning to the topic of depicting the nobility and the peasants by Jan Dlugosz, who in the first book of his “History of Poland” included a section entitled “On the Nature and Customs of the Poles”. “The analysis of Jan Dlugosz’s views shows, wrote F. Bujak, that in the eyes of the greatest connoisseur of Poland of that time, the Polish nation was homogeneous at the end of the Middle Ages, and the differences between the nobility and the peasants were determined only by the degree of wealth and culture” (Bujak, 1938, N4, pp. 258–269). The nobility in a modernized society left the historical arena and the peasant, according to F. Bujak, was to become “the expression of Poland”. Without trying to preach F. Bujak, however, predicted the beginning of a new period in the development of the Polish nation and culture – a period of predominance of the peasant element, which he preferred to consider the “peasant spring” (Bujak, 1938, N8, p. 488).

F. Bujak, however, did not consider this confrontation insurmountable and optimistically noted that “The two main strata of the Polish nation had a significant common feature, which

can be considered an advantage or a disadvantage depending on the point of view – the unwillingness to tolerate rape and coercion, based on deep feelings of self-righteousness and internal dignity. 150 years passed since the first partition and 200 years since the first Russian intervention (the quiet Sejm of 1717), and the nobility-nation did not stop striving for independence until it finally achieved independence” (Bujak, 1938, N4, pp. 268–269).

**The Conclusion.** Franciszek Bujak, the founder of the Polish School of Socio-Economic History, one of the most authoritative researchers of interwar Poland, left behind not only scientific but also journalistic heritage. An active participant in the “intellectual” competition for the restoration of historical Poland, in particular as a consultant at the Paris Peace Conference, F. Bujak even had experience of a political activity as the Minister of Agriculture. He witnessed the formation and transformation of the political system of the Second Polish-Lithuanian Commonwealth, and this influenced his interests and was reflected in his scientific and journalistic work.

F. Bujak, a native of a peasant family and a longtime member of the People’s Party, focused on the problems of the state’s relations with the peasants, the most numerous social stratum of that time. Considering the state as the highest degree of a social organization based on coercion, he advocated the harmonization of it through solidarity. F. Bujak interpreted solidarity as the best model of a social organization, believing that the solidarity of the society members is the primary and determining factor in the success of the state.

Reflecting on the social structure of interwar Poland, sandwiched between two totalitarianisms – Bolshevik and fascist – F. Bujak focused on a kind of “Polish totalitarianism” of J. Piłsudski, which maintained the appearance of democracy. The researcher considered classical totalitarianism impossible in Poland due to the incredible diversity of the Polish society. As for the latter, F. Bujak was mostly interested in issues related to the peasantry, which he considered not only the economic but also the spiritual basis of the state. The researcher considered the problems of the peasantry in opposition to the nobility as a privileged part of the society, which also underwent significant transformations. In this context, one of the urgent tasks he considered overcoming the prejudices of the state towards the peasants and the peasants towards the state. The latter, in his opinion, was possible only by raising the educational and cultural level of the peasantry.

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**HEALTH CARE SYSTEM TRANSFORMATION OF THE POPULATION  
OF THE WESTERN REGIONS OF UKRAINE (1939 – 1941):  
THE SOVIET HISTORIOGRAPHICAL MYTHS AND MODERN  
INTERPRETATION OF ARCHIVAL SOURCES**

**Abstract.** *The purpose of the research is the source historiographical characteristics of the health care system transformation of the population of the western regions of Ukraine at the initial stage of the region's Sovietization (1939 – 1941). The methodology of the research is based on the general principles of the methodology of historical cognition, based on the principles of historicism, objectivity and pluralism and reliance on historical sources and the use of general scientific (analysis, synthesis, induction and deduction, method of analogies) and special historical (genetic, comparative, systemic,*

historical periodization, retrospective) methods. **The scientific novelty** is that for the first time the greater part of valuable archival materials that elucidate little studied issues concerning institutional and procedural changes in the health care system of Western Ukraine in the context of the Soviet administrative model of social policy and Stalin's totalitarian regime in general were introduced into scientific circulation. **The Conclusions.** Relevant scientific publications and archival documents have been brought into a broader historiographical context due to the definition of the main components of the health care organization system, which provide the previous historical knowledge with the supplement of the outlined issues significantly. In detail there have been elucidated the dominant influence of the party ideologues of Stalin's totalitarian regime on the nature and essence of the radical change in the health care system of the western regions of Ukraine at the first stage of the region's Sovietization (the autumn of 1939 – the summer of 1941). There has been suggested the interpretation of the medical institutions' network growth, their bed stock, medical staff in the process of implementation of the Soviet policy of the health care system organization in the western regions of the Ukrainian Soviet Socialist Republic. Hence, there have been refuted the historiographical myths about the importance of the Communist Party's care and the personal role of the leaders of the Union of the Soviet Socialist Republics and the Ukrainian Soviet Socialist Republic in overcoming the backwardness of the medical sector in the western Ukrainian region of the period under analysis, which was caused by "a heavy national and social oppression of lordly Poland".

**Key words:** western regions of Ukraine, Sovietization, health care, medical institutions, medical staff, epidemic diseases.

## ТРАНСФОРМАЦІЯ СИСТЕМИ ОХОРОНИ ЗДОРОВ'Я НАСЕЛЕННЯ ЗАХІДНИХ ОБЛАСТЕЙ УКРАЇНИ В КОНТЕКСТІ ПОЛІТИКИ РАДЯНІЗАЦІЇ РЕГІОНУ (1939 – 1941): КРИТИЧНИЙ АНАЛІЗ РАДЯНСЬКОЇ ІСТОРІОГРАФІЇ КРИЗЬ ПРИЗМУ АРХІВНИХ ДОКУМЕНТІВ

**Анотація.** *Мета дослідження* – джерельно-історіографічна характеристика трансформації системи охорони здоров'я населення західних областей України на початковому етапі радянзації краю (1939 – 1941). *Методологія дослідження* базується на загальних засадах методології історичного пізнання, що ґрунтується на принципах історизму, об'єктивності та плюралізму, опори на історичні джерела, використанні загальнонаукових (аналіз, синтез, індукція та дедукція, метод аналогії) і спеціально-історичних (генетичний, порівняльний, системний, історичної періодизації, ретроспективний) методів. Наукова новизна полягає у впровадженні до наукового обігу значної частини цінних архівних матеріалів, що розкривають малодосліджені питання інституційно-процедурних змін системи охорони здоров'я населення Західної України у контексті насадження радянської адміністративної моделі соціальної політики та утвердження сталінського тоталітарного режиму загалом. **Висновки.** Через визначення основних складових системи організації охорони здоров'я впроваджено у ширший історіографічний контекст відповідні наукові публікації і архівні документи, які істотно доповнюють попередні історичні знання окремих питань окресленої проблематики. Докладно показано домінуючий вплив партійних ідеологем сталінського тоталітарного режиму на представлення характеру й сутності докорінної зміни системи охорони здоров'я населення західних областей України на першому етапі радянзації регіону (осінь 1939 – літо 1941 рр.). Запропоновано власну інтерпретації зростання мережі медичних закладів, їх ліжкового фонду, медичного персоналу в процесі впровадження радянської політики організації системи охорони здоров'я західних областей УРСР.

**Ключові слова:** західні області України, радянська організація, охорона здоров'я, лікувальні заклади, медичний персонал, епідемічні хвороби.

**The Problem Statement.** Some issues concerning the inhabitants' everyday life in the newly formed western regions of Ukraine at different stages of Sovietization of the region are in the focus of domestic researchers' view Popp, 2021, p. 163; Hordiyenko, 2022, p. 142; Starodubets, 2019, p. 179. At the same time, the health care sphere in the western

Ukrainian region at the beginning of World War II (the so-called entry of the Red Army into the south-eastern voivodships of the Second Commonwealth on September 17, 1939, can be interpreted in the context of World War II in favour of the new rulers – the Stalinist USSR and the Nazi (Hitler's) Germany) remains to be an unexplored important area of life of its inhabitants. It should be mentioned that it is impossible to obtain an adequate representation of the relevant historical period, both in modern scientific public discourse and in the mass historical memory of our contemporaries without a detailed study of not only a legal and institutional procedural component of the Soviet policy of radical change in the medical care system for the population of the newly annexed western regions of the Ukrainian SSR, but the essence and nature changes in living conditions affected by expanding the network of medical institutions personnel for appropriate services (especially in rural areas, taking into account the appropriate nature of the territorial and settlement structure of the western region during the period under analysis), reduction of infant mortality, and limitation of the scale of certain acute infectious diseases.

At the same time, the Soviet historiography theoretical and methodological rudiments should be left behind, interpreting the previous works critically and introducing valuable archival materials into scientific research (Dudnyk, 2022, p. 304) based on modern understanding of the health care system and its components, as in general Ukrainian dimension (Dudnyk & Shaurenko, 2022, p. 304) and regional, comparative and retrospective dimensions (Sahach & Lavrinenko, 2019, pp. 212–214).

**The Analysis of Recent Researches and Publications.** In 2001 the co-author of this article published the first generalized publication on the health care state of the population of the western regions of Ukraine in the second half of the 40s – 50s of the XXth century (Hulai, 2001, pp. 176–180). However, the author's aim was not to study the institutional and procedural features of health care transformation in Western Ukraine in the process of preparation and inclusion in the USSR as newly formed western regions of the Ukrainian SSR in 1939 – 1940.

The following work: “Drohobych: Historical Essays” could be a vivid and positive example of a thorough archival and bibliographic study of the outlined issues in a subregional dimension (Bohachenko & Romaniak, 2008).

Nevertheless, it is worth analyzing the publications of the last decade, which raised some issues concerning health care in the western regions of Ukraine. First of all, it is vital to refer to a separate section (2.3.3. “The Medical Activities Regulation in Prykarpattia during the Years of 1939 – 1950”) of the collective monograph “Public Health Management in Ukraine: Genesis and Development Prospects” (Bilinskyi & Radysh, 2013).

In this context, the following article should be mentioned: “Features of State Regulation of Medical Activities in Prykarpattia in 1939 – 1950” (Radysh & Soroka, 2012a, pp. 12–21), in which in the historical retrospective there were reflected the main issues of public health of the region and there were made conclusions that seem useful for further detailing the outlined issues in subsequent historical research.

The university teachers of the local medical university made their attempt and suggested subregional retrospectives of Ternopil region medical branch transformation (Kadobnyi, Kozak & Labivka, 2016, pp. 15–120). Despite some valuable results of the mentioned above research, in the work there is irritative influence of the Soviet historiography ideology (“As in other regions of Western Ukraine which were part of *lordly* Poland ..” – italics are added by us) and the fact that the wide source base of the State Archives of Ternopil region was ignored.

The article written by Ivano-Frankivsk team of authors stands out against the background, despite the narrow focus of novelty, there is a careful approach to the study of sources and interpretation of the results of Stanislaviv region residents' health care system study in the second half of the 40s – 50s (Skrypnyk etc., 2017, pp. 64–82).

Having chosen a rather narrow source and historiographical section of the study of the history of the medical field of Stanislavshchyna, other authors (Radysh & Soroka, 2012b, pp. 89–94; Soroka, 2013, pp. 137–141) presented valuable information that will be useful for future researchers.

**The Purpose of the Research.** The purpose of the study is the source historiographical characteristics of the health care system transformation among the population of the western regions of Ukraine at the initial stage of the region's Sovietization (1939 – 1941).

According to the set goal it is necessary to solve the following research tasks:

- to determine the main components of the health care organization system;
- to illustrate the influence of party ideologues on the coverage of the radical changes in the health care system of the population of Western Ukraine at the first stage of the region's Sovietization (the autumn of 1939 – the summer of 1941);
- to present a new interpretation concerning the medical institutions' network growth, their bed stock, medical staff in the process of implementing the Soviet policy of the health care system organization of the western regions of the Ukrainian SSR;
- to point out the scarcity of research on the acute epidemic diseases spread issues during the specified period;
- to suggest the theme for further analysis of the outlined research issues.

**The Results of the Research.** As a starting point, we should turn to understanding the state of health care primarily by determining the availability of an extensive network of medical institutions, a significant number of qualified medical personnel, who was able to provide a qualitative medical care on time and successful preventive work, and in order to do that it was impossible without an adequate number of appropriate premises for treatment and prevention facilities equipped with appropriate medical equipment and adequate provision of medicines (Hulai, 2001, p. 176).

It is quite obvious that some issues concerning public health in the western regions of the Ukrainian SSR in 1939 – 1941 were the subject of separate publications written by the Soviet authors, which sometimes formed the basis of modern historical publications uncritically, which, in our opinion, not only indicated the superficial level of individual authors contemporaries but through the introduction of modern information and communication technologies of such works in a wider public access may lead to corresponding distortions in the minds of individual consumers of such content, which, in turn, replicate some very obvious ideological postulates among its narrower audience, in fact, distort the historical truth, returning it to the modified narratives of the historical policy of the Russian Federation in the course of a large-scale aggression against independent Ukraine.

In this article, we will try to analyze individual publications of the Soviet period authors critically, both by exposing the dominant party and ideological context and introducing into wide historical use information obtained from the archives of the same Soviet period, which was unpublished.

First of all, even works on medical issues were full of propaganda clichés in line with the dominant communist ideology of that time: “In September of 1939, during the war with Nazi Germany, the Polish government left its state to its own fate... The Soviet Army liberated the long-suffering people of Western Ukraine from the foreign enslavement” (Chemeris, 1961, p. 180).

In no way often justifying the facts of discrimination in the socio-economic policy of the governments of the Second Commonwealth, in particular, in the field of health care of the predominant Ukrainian Volyn, Lviv, Stanislaviv and Tarnopol voivodships, we cannot ignore the scientific thesis as propaganda cliché (“Polish occupiers allocated meager funds for the maintenance of medical facilities”) (Garagash’yan & Parashchak, 1972, p. 23). Hence, according to the Soviet authors, in 1935 those allocations amounted to 1113,310 złotych or 0,95 złotych per capita (respectively, 83,540 zł came from the state budget, 4,257,222 zł from city self-government budgets and 6,04048 zł from county self-government budgets) (Garagash’yan & Parashchak, 1972, pp. 23–24).

It is obvious that health care system financing in the south-eastern voivodships of interwar Poland was insufficient, according to the corresponding position of official Warsaw concerning the predominantly Ukrainian population of former Eastern Galicia (Halychyna) and Western Volyn, but, at the same time, the basic postulates of the Soviet historiography, such as “The government of bourgeois Poland allocated a meager sum for health care” (Chemerys, 1959, p. 5) should be concretized in reference to relevant sources, because otherwise this amount (0, 14 zł per year per capita) dissonants with other facts sharply, which were found on the pages of the Soviet period papers and could be presented in the above-mentioned paragraph.

I. Ishchenko, another author of that period, did not provide any financial statistics in order to confirm the thesis that “in 1940 Ternopil had the same allocations for health care as the whole lordly Poland” (Ishchenko, 1961, p. 57).

Hence, emphasizing the fact that “Stanislaviv Voivodeship, like all bourgeois Poland, did not have a sufficient number of hospital beds” (Garagash’yan & Parashchak, 1972, p. 22), the Soviet authors referred to the data of 1934, according to which the provision of hospital beds was 0,7 in Stanislaviv Voivodeship of that time (based on 1000 inhabitants) (Garagash’yan & Parashchak, 1972, p. 22).

It should be noted that in the archival materials we also came across a lot of information that should have emphasized the relevant state of the medical sphere on the eve of the inclusion of Western Ukraine in the Ukrainian SSR. Hence, in the materials of Ternopil Regional Executive Committee, we found information that there were only 9 hospitals in 1939 out of 17 povits (counties) of voivodeship of that time, there were only 30 doctors in 1218 villages of Ternopil region, which led to a high mortality (17,4% in 1938) of patients who sought for medical help (SATR, f. R-1833, d. 6, c. 2, p. 11).

The archival sources of the medical institutions’ network growth and the increase in the number of hospital beds during the first years of the Soviet regime in the former southeastern voivodeships of the Second Commonwealth were not as impressive as the communist propaganda and the Soviet-era authors stated. For example, it could be confirmed by some archival sources that did not gain wide scientific use yet, in particular, from Fund F. R-312 “Lviv Regional Department of Health” of the State Archives of Lviv region (SALR, f. R-312, d. 1, c. 2, pp. 4, 10v.).

According to the DATO materials, there were 20 hospitals with 939 beds, 19 polyclinics, and 50 outpatient clinics were opened in 13 povits (counties) of the newly formed Ternopil region on December 20, 1939 (SATR, f. R-1833, d. 6, c. 2, p. 11).

It was characteristic of the Soviet historians to concentrate on certain quantitative indicators that did not reveal the essence of the relevant changes. For example, V. Danileichenko emphasized only the fact that in 1940, compared with 1938, the network of outpatient hospitals in Lviv region increased 12,5 times but, at the same time, the provision of hospital beds per 1,000

population increased from 1,86 to 3,5 including in the countryside – 0,17 beds (Danileichenko, 1961, p. 45), taking these figures into account, we can infer that most of the newly opened medical facilities were located in small adapted rooms, especially in rural areas, and that is why, there was no possibility for a significant number of hospital beds.

Consequently, we cannot but point out that the available archival materials contain information on the relevant quantitative changes. For instance, during the period from mid-September of 1939 to the beginning of March of 1940, the number of hospital beds in Stanislaviv region increased from 771 to 1664 (SAIFR, f. P-1, d. 1, c. 7, p. 40).

Summary statistics on the number of hospital beds by type of settlement could be seen in Table 1 (SALR, f. R-312, d. 2, c. 43, pp. 163, 203).

Table 1

**The number of hospital beds in medical institutions of all types in the western regions of Ukraine (1940 – 1945)**

Region	Urban area	Rural area		
	1940	1945	1940	1945
Volyn	1173	1190	100	312
Drohobych	1776	1476	191	384
Lviv	4375	3828	191	165
Rivne	1240	3828	425	710
Stanislaviv	1991	1015	167	450
Ternopil	1465	1180	441	615
Chernivtsi	1887	2095	220	460

If, on October 17, 1939, there were 8 hospitals, 14 polyclinics (including 3 in rural areas), and 15 medical centers (including 8 in rural areas) in the territory of the future Stanislaviv region of the Ukrainian SSR, on March 1, 1940, there were already 33 hospitals (including 13 in rural areas), 26 polyclinics (3 in rural areas), 49 outpatient clinics (35 in rural areas), and 51 medical centers (41 in rural areas), 13 sanitary and epidemiological stations (1 – in the village) (SAIFR, f. P-1, d. 1, c. 7, p. 40).

The specific terminology and dominance of the quantitative presentation of the work results in the health care of the population in the newly formed western regions of the Ukrainian SSR were particularly eminent and declared at public party events. For example, on January 11, 1941 at the party activists meeting in Stanislaviv region, it was highlighted that there were 78 “hospitals” before the Soviet power establishment in the region, then during the first year of the Soviet rule there were opened 184 “hospitals”, 22 maternity hospitals, 491 outpatient clinics and polyclinics (SAIFR, f. P-1, d. 1, c. 116, p. 5). In particular, there were 25 hospitals, 26 polyclinics, 36 outpatient clinics, where 583 doctors worked in Stanislaviv region at the beginning of 1941. It was emphasized that in 1938 there were only 11 medical institutions with 45 doctors (SAIFR, f. P-1, d. 1, c. 116, p. 5).

Furthermore, the emphasis was put on the fact that numerous doctors – natives of Western Ukraine, were actively involved in the work of children’s treatment and prevention facilities, (Muhina & Danileichenko, 1961, p. 94) “who were deprived of the opportunity to get a job according to the specialty, while being under the foreign rule, remained unemployed” (Muhina & Danileichenko, 1961, p. 94), however, the authors do not cite any statistics and personalities of the medical personnel.

The fate of those doctors, who were persecuted or physically exterminated by the Soviet repressive and punitive authorities due to their pre-war political position or nationality needs to be studied in detail in this context (Ilnytskyi, 2018, pp. 122–148).

To our mind, the Soviet period authors' statement seems too categorical – “All doctors, who were engaged in private practice and unemployed doctors got jobs in the state medical and preventive institutions that opened” (Garagash'yan & Parashchak, 1972, p. 43).

Without the source reference, T. Burykhin's article provided statistics that had to show significant changes in the provision of medical personnel to the newly formed health care system of the western regions of the Ukrainian SSR in 1940, due to arbitrary comparison of relevant statistics, when instead of the same in Soviet historiography, the calculation of the number of doctors and paramedics per 1000 population, *вказаним автором абсолютні числа діляться 10000*, the specified absolute numbers are divided by 10000, and thus, the corresponding figures seem more convincing to confirm the propaganda constructs: hence, there were 23 doctors and 46 paramedics in the cities, respectively, and 1,2 doctors and 4,9 paramedics (Burihin, 1961, p. 29).

In addition, while analyzing the Soviet health statistics, certain disparities in the share of involvement in half or even a quarter of the medical rate of the majority of medical workers became apparent. For example, at the end of 1940, 487 treatment and prevention facilities were opened in Stanislaviv region (235 in urban areas and 252 in rural areas), but at the same time, according to other sources, there were 551 doctors and 1,288 paramedics in the region (Garagash'yan & Parashchak, 1972, p. 43).

The party leaders were forced to admit that there was an acute shortage of paramedics in the work of medical institutions. For example, a secondary medical and obstetric school was opened in Stanislaviv, but the work was not put to a proper level by the beginning of March of 1940 (SAIFR, f. P-1, d. 1, c. 7, p. 41).

It is interesting to trace the relationship between the components of the proposed propaganda structure: “Social and national oppression, brutal exploitation of workers, low cultural level and lack of free medical care created a favorable ground for the spread of various infectious diseases, including tuberculosis, which was a chronic epidemic disease in Western Ukraine” (Chemerys, 1959, p. 5).

The party document pointed out that the Soviet authorities paid special attention to the fight against sexually transmitted diseases, “Poland was very notorious for”, (SAIFR, f. P-1, d. 1, c. 7, p. 41), but, at the same time, information about these diseases were considered to be a secret in the Union of Soviet Socialist Republics.

Nevertheless, even the Soviet historians could not help but acknowledge that in interwar Poland, “Infectious patients with sexually transmitted diseases received outpatient care partially free of charge” (Garagash'yan & Parashchak, 1972, p. 24).

Taking into account the quantitative indicators of the growth of anti-tuberculosis and venereology dispensaries, points and offices (in 1940 17 skincare establishments were opened in Lviv region, which, in our opinion, taking into account the population of the largest region of Western Ukraine was too small) the above-mentioned V. Danileichenko (Danileichenko, 1961, p. 45) did not indicate the scale of the disease.

During the above-mentioned period, the incidence of tuberculosis remained quite high. Hence, there were 8760 patients registered ill with this disease in Lviv region in 1940, which was 25 patients per 1000 population (SALR, f. R-312, d. 2, c. 3, p. 138). Consequently, a regional anti-tuberculosis dispensary was opened in Drohobych with the Soviet power

establishment in 1939, and on January 3, 1940, tuberculosis hospital with 20-beds was opened there. However, according to modern researchers, the place of operation of those institutions and the names of doctors, who worked there were not established. It is known that P. Yudkevych, an employee of the Ukrainian Research Institute of Tuberculosis. F. Yanovsky (Kyiv) was appointed the chief doctor of the anti-tuberculosis dispensary (Bohachenko & Romaniak, 2008, 186).

In order to compare, let's consider Ternopil region, in April of 1940, among the institutions of the relevant profile there operated 15 tuberculosis dispensaries, 7 venereology dispensaries and 1 trachoma dispensary (SATR, f. P. 1, d. 1, c. 3, p. 55).

In conclusion, it should be mentioned that some issues of transformation of the health care system of Western Ukraine at the first stage (1939 – 1941), which were analyzed in previous Soviet historiography and found a brief reflection in modern publications were supplemented only by a small part of the archival materials of the three archives of the region – SAIFR, SALR and SATR. In our opinion, it allows us to suggest a broader retrospective, as narrowly specialized issues concerning the history of medicine in Ukraine in the above-mentioned period, complement the overall picture of an everyday life of residents of western Ukraine significantly.

**The Conclusions and Prospects for Further Research.** Hence, the research results allow us to draw the following conclusions:

- first of all, due to the definition of the main components of the health care organization system, relevant scientific publications and archival documents were introduced into a broader historiographical context, which supplement the previous historical knowledge of certain aspects of the outlined issues significantly;
- second of all, the Soviet historiographical myths were deconstructed about the determination of the Communist Party's care and the personal role of the Union of Socialist Soviet Republics leaders and the Ukrainian Soviet Socialist Republic in overcoming the backwardness of the medical sector in the western Ukrainian region of 1939 – 1941, caused by “a heavy national and social oppression”;
- third of all, the dominant influence of the party ideologues of the Stalinist totalitarian regime on the representation of the nature and essence of the radical change in the health care system of the western regions of Ukraine at the first stage of the region's Sovietization (the autumn of 1939 – the summer of 1941) was elucidated in detail;
- fourth of all, there was suggested our own interpretation of the medical institutions network growth, their bed stock, medical staff in the process of implementing the Soviet policy of organization of the health care system of the western regions of the Ukrainian Soviet Socialist Republic.

The perspective directions of further research should be considered in the comparative context of subregional (in the context of a particular region) / local (for example, the largest cities in the western region, which were also the administrative centers of the western regions of the Ukrainian Soviet Socialist Republic) analysis of the transformation of medical institutions and their staff.

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**OPERATIONAL GAMES AS A METHOD OF STRUGGLE OF THE OUN SPECIAL DIVISIONS AGAINST THE SOVIET SPECIAL SERVICES IN WESTERN UKRAINE (1944 – THE BEGINNING OF THE 1950s)**

**Abstract.** *The aim of the study is implementation of scientific and documentary reconstruction of an essence and appointment of operational games by the Security Service (SB) of the OUN (S. Bandera) in the 1940s aimed against the Soviet secret service as part of the confrontation of the armed national and independent underground in Western Ukraine with the Soviet security forces. The Research Methodology.* *The authors based the study on the structural and systemic approach of the analysis in order to identify the structural and functional role of the operational games in the system of secret confrontation of the OUN. The historical and analytical, historical and genetic and historical and comparative methods as well as the method of documentary verification have been used. The scientific novelty is based on the fact that for the first time the tasks, mechanism, forms and methods of using the operative game as the highest form of operative art by the OUN special unit have been comprehensively analyzed taking into account the wide range of archival sources and in the context of the OUN's confrontation with the Soviet secret services,*

also the fundamental types of accomplished operational measures of the OUN special units have been and evaluated on the basis of their effectiveness. **The Conclusion.** It is a proved fact that during the post-war period the level of reconnaissance activities of the OUN special forces increased qualitatively, their direction was the desire to create their own informational and reconnaissance positions in the enemy's secret services and their intelligence apparatus. Complex operational games with the Soviet state security agencies testified to the SB OUN attempt to master the classical methods of operative art of the secret services. The main way of conducting the games was considered to be the "voluntary" immersion of one's own informants in state security units (usually at the local level) according to the legend developed by the SB, with the further strengthening of trust in them, expansion of their intelligence capabilities. The tasks of those games included the identification of operatives-agents and agents of state security in the ranks of the underground; promotion of misinformation about the state of affairs in the underground; extortion and neutralization, or the use of "without knowledge" or through the recruitment of confidants of state security agencies for the development of the game itself; identification of tasks and plans of operational counterintelligence measures in relation to the underground; study of forms and methods of intelligence and operational work of state security bodies.

**Key words:** special services, operative art, operative game, intelligence, counterintelligence, Ukrainian nationalists movement.

### ОПЕРАТИВНІ ІГРИ ЯК МЕТОД ПРОТИБОРСТВА СПЕЦІАЛЬНИХ ПІДРОЗДІЛІВ ОУН З РАДЯНСЬКИМИ СПЕЦСЛУЖБАМИ У ЗАХІДНІЙ УКРАЇНІ (1944 – ПОЧАТОК 1950-х рр.)

**Анотація.** *Мета дослідження* – здійснення науково-документальної реконструкції сутності та призначення проведення Службою безпеки (СБ) ОУН (С. Бандери) у 1940-х рр. оперативних ігор проти радянської спецслужби як складової протиборства озброєного націонал-самостійницького підпілля у Західній Україні із силовими структурами СРСР. **Методологія дослідження.** Автори поклали в основу дослідження структурно-системний підхід з метою виявлення структурно-функціональної ролі оперативних ігор у системі таємного протиборства ОУН. Задучено історико-аналітичний, історико-генетичний, історико-порівняльний та метод документальної верифікації. **Наукова новизна** полягає у тому, що на основі широкого кола архівних джерел та у контексті протиборства ОУН із радянськими спецслужбами уперше комплексно досліджено завдання, механізм, форми і методи використання спеціалізованих підрозділів ОУН оперативної гри як вищої форми оперативного мистецтва, узагальнено основні види кваліфікованих оперативних заходів спеціалізованого підрозділу ОУН та дано оцінку їх ефективності. **Висновки.** Доведено, що у післявоєнний період якісно зріс рівень розвідувальних заходів спеціалізованих підрозділів підпілля ОУН, їх напрямом стало прагнення створити власні інформаційно-розвідувальні позиції у спецслужбах противника та їх агентурному апараті. Складні оперативні ігри із радянськими органами держбезпеки стали свідченням намагання СБ ОУН опанувати класичними методами оперативного мистецтва спецслужб. Основним способом проведення ігор уважалося "добровільне" занурення власних інформаторів у підрозділи держбезпеки (як правило, місцевого рівня) за розробленою СБ легендою, із подальшим зміцненням довіри до них, розширенням їх розвідувальних можливостей. До завдань цих ігор входили ідентифікація оперативників-агентуристів і агентури держбезпеки у лавах підпілля; просування дезінформації про стан справ у підпіллі; виманювання й знешкодження, або використання "втемну" або через перевербування конфідентів органів держбезпеки для розвитку самої гри; виявлення завдань і планів оперативних заходів контррозвідки щодо підпілля; вивчення форм і методів агентурно-оперативної роботи органів держбезпеки.

**Ключові слова:** спецслужби, оперативне мистецтво, оперативна гра, розвідка, контррозвідка, рух українських націоналістів.

**The Problem Statement.** Against the background of a huge research literature on the strategy and tactics issues of the armed activities of the Ukrainian nationalist movement in a violent resistance to the Sovietization of Western Ukraine in 1944 – the beginning

of the 1950s, one of the least studied aspects of the problem is the analysis of the forms and methods peculiarities of the OUN intelligence and counterintelligence activities. In particular, it concerns the facts of the organization of operational games against the Soviet state security agencies by a special body of the underground, which serves as scientific and historical evidence of organizational and tactical maturity, serious professional skills of the military and special component of independent statesmen movement.

**The Analysis of Recent Researches and Publications.** In 1994, for the first time Ivan Bilas covered the operational game of the regional officer of the Security Service Mykola Kozak (“Smoka”) with the leadership of the NKVD of the Ukrainian SSR (Bilas, 1994a). The following year, this topic was supplemented by Petro Boyarchuk, Volyn publicist (Boiarchuk, 1995), and in 2000 – by historians Dmytro Viedienieiev and Serhiy Shevchenko (Viedienieiev & Shevchenko, 2000). During the period of 2006 – 2007, D. Viedienieiev and Hennadiy Bystrukhin continued their research of the operative game initiated by “Smoka” (Viedienieiev & Bystrukhin, 2006; Viedienieiev & Bystrukhin, 2007a; Viedienieiev & Bystrukhin, 2007b). In 2009 the place of Liudmyla Foya (“Oksana”) in this operation was elucidated by Volodymyr Ivanchenko in a separate book (Ivanchenko, 2009). Protocols of interrogations of the arrested NKVD agents by the SB OUN: Mykhailo Zakharchevsky (“Taran”), Kateryna Minkovska (“Yevhenia”), Nina Kaluzhenko (“Iryna”) and L. Foya (“Aprilska”) were published by Serhiy Burlaka in 2018 (Burlaka, 2018).

Vasyl Ilnytskyi was the first one who analyzed the operational game of the Security Service of the Carpathian Region, which involved the use of the arrested Soviet agent Yakov Kozlov (“Yarovy”) (Ilnytskyi, 2016; Ilnytskyi, 2017).

Some examples of the use of the recruited Soviet agency by the OUN Security Service (SB) were covered in the publications of Anatoliy Rusnachenko (Rusnachenko, 2002), Valeria Yefymenko (Yefymenko, 2002), Yaroslav Antoniuk (Kucherepa, 2012; Antoniuk, 2021) and many others. However, nowadays, there is no scientific research that would comprehensively analyze the experience of the OUN Security Service (SB) in conducting operational games.

**The purpose of the research** is scientific and documentary reconstruction and analysis of military and historical circumstances, purpose, methods of conducting special games against the Soviet special service by the special body of the OUN (B) as the highest form of operational art of the OUN Security Service during the confrontation of the armed national and independent underground in Western Ukraine with the security forces of the USSR.

**The Results of the Research.** Based on the ideas established in the theory of operational activities of special services, “operational game” means a system of counterintelligence operations and activities on behalf of the special services and with the participation of its confidential assistants (agents), who penetrated into the personnel or intelligence apparatus of the enemy’s special services, and with the use of obtained opportunities in their interests promote disinformation among the enemy systematically, solve other operationally significant tasks, provide control of one’s own side over certain areas of activity or measures of the enemy’s intelligence services (Nikitchenko, 1972, p. 114).

In the work of special services, “operational games” are considered the highest manifestation of operational art. This term was introduced in the 1920s to ODPU officers as part of combination operations against foreign centers of “white” and the Ukrainian independent emigration and foreign intelligence services – their curators.

In the context of the subject of our article, it is expedient to take into account that the balance of power between the Soviet state security bodies and the OUN (B) Security Service

in terms of games and other skilled operational measures was not in favour of the anti-Soviet resistance movement (despite the fact that special forces of nationalists tried to master in practice persistently and in the course of operational experience training of the state special services of pre-war Poland, the USSR and Germany) (Viedienieiev & Bystrukhin, 2006, pp. 222–233; Ohorodnik, 2009; Antoniuk, 2021). By that time, the Soviet counterintelligence had accumulated a solid experience in operational games involving the legendary “enemy cells”. Suffice it to mention the classic operative games of the 1920s: “Trust”, “Syndicate”, “Academy”, as well as “Tobacco” (“Case 39”) and transporting from abroad the head of the Partisan-insurgent headquarters of the UPR, General Yurko Tiutiunyk (Serhiy Karin-Danylenko, the future elaborator of the 1940s game against the OUN (B) leadership in Western Ukraine and deputy head of the counterintelligence department of the UkrSSR NKGB took an active part in it) (Viedienieiev, 2008, pp. 34–35; Viedienieiev, 2014). In 1941 – 1945 the operational art of the Soviets was enriched by long classical operative games “Berezino”, “Couriers”, “Monastery” with the special services of the Third Reich (sometimes up to 70 operational games were conducted simultaneously by the state security agencies and SMERSH to promote strategic disinformation in the interests of frontline operations) (Baryshnikov & Tarasov, 1964, pp. 69; Viedienieiev, 2014, pp. 454–457; Tkachenko & Shpalchenko, 2019, pp. 134–138).

Special units of the Ukrainian nationalist organizations did not use the definition of “operational game”, although they tried to resort to measures with all the basic features of such an operational game measure. It should be noted that the first documentary evidence we found concerning the attempts to organize games by the armed underground of the OUN dates back to the Sovietization of Western Ukraine in 1939 – 1941 (Archive of the Security Service of Ukraine in Ternopil region – ASSUTR, f. 1, c. 13444, p. 95; Sectoral State Archive of the Security Service of Ukraine – SSASSU, f. 73, d. 1, c. 451, p. 207). In particular, in 1940 – 1941 one of the leaders of the OUN special unit Mykola Arsenych (“Mykhailo”) developed the idea of an “operational game” of the OUN (B) Security Service using the detained and recruited member of the NKVD and taken abroad for further advance of Yaroslav Horbov (“Buya”), the emissary of Krakow center of the OUN (B) to Berlin OUN center. In addition to spreading disinformation to the Chekists, there were plans to lure abroad the recruiter of “Buya” – P. Sudoplatov, one of the heads of foreign intelligence of the NKVD-NKDB (ASSULR, f. 6, c. 33283, p. 15; Viedienieiev & Shevchenko, 2002). The use of the same method was continued by the esbists during the Nazi occupation of Ukraine (SSASSU, f. 6, d. 1, c. 33286, vol. 1, pp. 323–324).

The practice of using the Security Service (SB) of double agents (“dvorushnyky” in the terminology of the Chekists) to misinform the Soviet secret services became the most widespread during the postwar period (Yefymenko, 2002, p. 139; Ilnytskyi & Kantor, 2018, pp. 173–180; Ilnytskyi, 2018, pp. 326–337; Antoniuk & Trofymovych, 2021, p. 119). Attempts to immerse their agents in the Soviet security forces and the network of their secret agents intensified (Antoniuk, 2018, p. 174). For example, the informant of the Security Service (SB) “Maryka” worked during the autumn of 1945 in Medenytsia regional department of the NKVD of Drohobych region (Rusnachenko, 2002: 320). During the period of October – December of the same year, two similar cases were detected in Ponykovets district of Lviv region (SSASSU, f. 71, d. 9, c. 147, p. 84; c. 150, p. 57; c. 161, p. 266).

According to the Soviet side, the underground special forces attempts to ‘include’ and introduce their own confidants into the NKDB-MGB intelligence apparatus lasted until 1952

(SSASSU, f. 71, d. 9, c. 204, p. 247; Vovk, Pavlenko & Cherchenko, 2001, p. 458). Thus, in April – May of 1951, during the inspection in 28 regional departments of the MGB of the western regions of Ukraine there were found 65 double agents (“dvorushnyky”) (SSASSU, f. 2, d. 1, c. 1876, p. 276).

A typical example is provided in this article. On January 15, 1946, a woman with a certificate in the name of H. Fedoruk came to Volyn Region KGB Office and asked for a meeting with an operative. During a conversation with the UNKD officer, she announced her real name – Nadiya Kudryk. During the interrogation, she said that she worked as a printer for the security officer of Lutsk regional branch “Mykyta” and stated her desire to be found guilty. At the same time, N. Kudryk expressed a desire to carry out intelligence tasks in the NKGB. She explained her visit to Lutsk by the need for a dental treatment. According to a dentist examination N. Kudryk’s teeth did not need any treatment. This circumstance, as well as obsessive offers to help in the fight against the OUN, aroused suspicion.

During further interrogation, N. Kudryk admitted that she had arrived for intelligence purposes, hoping to learn about the intelligence work of the regional UNKVD (SSASSU, f. 13, d. 1, c. 372, vol. 92, pp. 210–213).

From a professional point of view, it is significant that in “sending” their agents to the enemy, the Security Council gave an important role to the development of “legends” about the agents. Sometimes, for the sake of plausibility, they were allowed to “expose” the places of hideouts, “dead spots” or even members of the underground (ASSULR, f. 5, c. 2234, p. 15; VMLL, f. KDF-21337, kv-93694, pp. 40–45). However, despite the measures taken, the failures could not be avoided (ASSUVR, f. 5, c. 7383, vol. 1, pp. 1–109; vol. 2, pp. 1–84; SSASSU, f. 13, d. 1, c. 372, vol. 8, pp. 61–62; f. 71, d. 9, c. 226, pp. 119–120; Viedenieiev & Bystrukhin, 2007a, p. 298).

Taking into consideration the difficulty of creating intelligence positions among the Soviet secret services, the SB tried to recruit informants of the enemy, especially those, who voluntarily confessed and wanted to atone for the guilt (Ilnytskyi, 2016, p. 174). During the spring of 1947, such three cases were registered in Lviv and Ternopil regions (SSASSU, f. 13, d. 1, c. 372, vol. 8, pp. 61–62; f. 71, d. 9, c. 212, p. 20; c. 226, pp. 119–120). During the period of July of 1947 – May of 1948, Ivan Matios, a double agent, managed to misinform the bodies of the UMDB of Chernivtsi region concerning the fate of agent Ya. Kozlov (“Yarovy”) (SSASSU, f. 60, d. 1, c. 86736, vol. 25, pp. 114, 119–120, 150, 168; Ilnytskyi, 2017, p. 246).

A high level of professionalism of the OUN Security Service (SB) is evidenced by the operational game conducted by M. Kozak (“Shepherd”), the OUN Security Service officer at the PZUZ, with the leadership of the NKGB of the UkrSSR in 1945 (Kucherepa, 2012, p. 98). At the beginning of 1945, S. Karin-Danylenko, an experienced functionary of the NKGB of the Ukrainian SSR, established the legendary “the OUN Leadership in the Eastern Ukrainian Lands”. He was tasked with involving the Soviet agency into the OUN leadership at the PZUZ. Experienced ODPU agents M. Zakhazhevsky (“Taran”) and K. Minkovska (“Yevheniya”) were appointed the head of this structure. They were joined by a recruited member of the OUN Kyiv branch, L. Foy (“Oksana”) (SSASSU, f. 2, d. 1, c. 342, pp. 1–112; c. 343, pp. 1–163; f. 6, d. 1, c. 74331, pp. 20, 28, 33; Viedenieiev & Bystrukhin, 2007b, pp. 93–94). Other members of “the OUN leadership in the Eastern Ukrainian Lands” were used “directly” (*Author* – that is, they believed that they were really members of the underground), including “SB officer” Anatoliy Yeremenko (“Tymosh”) (Burlaka, 2018, p. 83). On May 6, 1945, the NKGB agents L. Foya (“Oksana”) and N. Kaluzhenko (“Iryna”) arrived in Lutsk. Under the guise of representatives

of the OUN Leadership in the Eastern Ukrainian Lands, they tried to get in touch with the OUN leadership and deliver fabricated “mail” (SSASSU, f. 73, d. 1, c. 453, p. 43). Among them there was a letter with threats addressed to the Soviet writer M. Rylsky (SSASSU, f. 2, d. 1, c. 342, pp. 12–27; Boiarchuk, 1995, p. 2). The actions of these NKGB agents attracted the attention of esbists. Therefore, they were monitored. Four days later, the esbists appointed “couriers” a meeting place outside the city. Immediately upon arrival, they were captured by Lutsk district SB members headed by Petro Tykhniuk (“Mykhas”) (Bilas, 1994b, pp. 363–364). During interrogations, L. Foya voluntarily confessed to cooperating with the NKGB and provided a detailed testimony about her intelligence tasks (SSASSU, f. 13, d. 1, c. 372, vol. 20, p. 166). Instead, N. Kaluzhenko denied any connection with the Soviet secret services and was executed (SSASSU, f. 2, d. 1, c. 1981, pp. 169–173). Later, M. Kozak recruited L. Foy personally. After several weeks of talks, she agreed to take part in the “operational game” of the Security Service with the leadership of the NKGB of the UkrSSR. On July 19, 1945, L. Foya returned to Lutsk, where she re-established contact with the NKGB (SSASSU, f. 60, d. 1, c. 11946, pp. 109–113; Ivanchenko, 2009, p. 29). On July 23 of the same year, she returned to Kyiv with a significant amount of underground literature (Viedienieiev & Bystrukhin, 2007a, p. 212). Meeting at the secret apartment with the Deputy Minister of State Security of the UkrSSR, Lieutenant General Pavlo Drozdetsky, L. Foya reported on the success of the operation and persuaded to send “Taran” with “Yevheniya” to Volyn. Underestimation by the heads of the NKGB of the Ukrainian SSR of the professionalism of the OUN Security Service and success euphoria ensured the further operation success (Viedienieiev & Bystrukhin, 2006, p. 198). It was decided to send M. Zakhazhevsky to Lutsk, who was seized at the “communication point” by esbists in August of 1945 (SSASSU, f. 6, d. 1, c. 71184, pp. 32–24). During the interrogations, “Taran” confessed to his agency tasks and agreed to write a letter with a proposal to call “Yevhenia” (SSASSU, f. 2, d. 1, c. 342, p. 1). On September 19, 1945, L. Foya brought K. Minkovska to Lutsk. A few days later, she was also arrested by esbists at the “communication point” (SSASSU, f. 65, d. 1, c. 8978, vol. 4, pp. 191–198). M. Kozak’s misinformation of the leadership of the NKGB of the Ukrainian SSR lasted until April of 1946 (Ivanchenko, 2009, p. 37). Only on May 20, 1948 the State Security Committee of the Ukrainian SSR issued a decision to exclude L. Foya from the intelligence network (SSASSU, f. 60, d. 1, c. 11946). In the future, the mentioned SB employee edited the journals of the OUN leadership at PZUZ (SSASSU, f. 13, d. 1, c. 372, vol. 20, p. 168). Interestingly, after the above-mentioned “letter to M. Rylsky” was found in the underground archives in 1946, the Minister of Internal Affairs of the UkrSSR Tymofiy Strokach reported about it to the Union Minister Serhiy Kruhlov and M. Khrushchov, considering the fabricated document as “methods of police toothpicking”. Combined with the game failure, this led to the dismissal of S. Karina-Danylenko from the ranks of state security agencies in 1947.

**The Conclusions.** During the post-war period, the level of reconnaissance activities of special units of the OUN underground increased significantly, which vigorously resorted to building an intelligence network among the population, tried to create their own positions in the administrative apparatus, industrial institutions, communications, public associations, educational institutions. A new area of operational activity of the OUN Security Service (SB) was the desire to create its own information and intelligence positions in the enemy’s special services and their intelligence apparatus.

Quite complex operational games with the Soviet state security agencies testified to the growth of the OUN Security Service (SB) counterintelligence skills, its attempts to master the classical methods of of the secret services operational art. According to the documents

under analysis, the Security Service (SB) in some cases even managed to intercept the initiative of the Soviet counterintelligence and impose a difficult game with the NKGB in response, for a long time to imitate the “activities of the embedded agency” of the Chekists in the underground environment, promoting the disinformation concluded by the Security Service (SB) and obtaining additional information about the plans of the enemy and its official orientation towards the nationalist underground.

The leading method of conducting the games was considered to be a “voluntary” immersion of informants in the state security units (usually at the local level) according to the legend developed by the Security Service (SB), with a further strengthening of trust in them, and expanding their intelligence capabilities.

The analysis of the documents studied by us allows us to identify the leading tasks pursued by the Security Service (SB) during the games with the NKGB-MGB. Among them: identification of operatives-agents and agents of state security in the ranks of the underground; promoting misinformation about the state of affairs in the underground; extortion and liquidation, or the use of “dark” or through the persuasion of the confidants of state security agencies for the development of the game itself; identification of tasks and plans of operational counterintelligence measures in relation to the underground; study of forms and methods of intelligence and operational work of state security bodies.

The majority of the future “double agents” of the Security Service (SB) were recruited from people who voluntarily confessed to being recruited by the state security agencies and wished to atone for their guilt for the underground. At the same time, there arose the task of their serious preparation before the assignment execution, the education of psychological resilience.

Conducting operational games is one of the most complex and skilled methods of operational art as its component. Thus, in general, the elaboration of the idea, plan and scenario of participation in operational games became a serious catalyst for the OUN special unit to improve their professional skills, in particular – the analytical component of operational work (including the development of disinformation materials and “legends” of cover), improving the skills of employees and comprehensive study of the arsenal of enemy intelligence services, improving recruitment skills, providing reliable channels of communication with their own participants in the game, etc.

Operational experience gained in the 1940s during the confrontation in Western Ukraine, the study of forms and methods of the Soviet special services were useful for the Security Service of the OUN Foreign Parts (FU) in exile, who resorted to the method of an operational play (the last operational game of the OUN Central Committee against the KGB of the USSR lasted until 1983).

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**LEGAL AND REGULATORY SETTLEMENT OF THE LANGUAGE ISSUE  
IN THE SOVIET UKRAINE (1964 – 1985):  
SCIENTIFIC AND EDUCATIONAL ASPECT**

**Abstract.** *A comprehensive analysis of the legal and regulatory framework for the settlement of the language issue in the USSR, as well as the study of its influence on the processes of russification in the scientific and educational sphere is the main purpose of this article. The Methodological basis of the research is the complex of general scientific methods, especially historical and interdisciplinary methods that enable you to solve the problem of scientific knowledge comprehensively. The article is based on the principles of historicism, objectivism, logic and continuity. The scientific novelty is that for the first time systematized the complex sources that confirm russification in educational and scientific fields of Soviet Ukraine. It was implemented into the scientific circulation of new documentary evidence about the Soviet language policy. The Conclusion. In the research it has been highlighted the key legal documents that testified russification in educational and scientific spheres. It was identified the features*

of the implementation of a language policy in all schools of the Ukr-SSR. A detailed analysis of archival materials allowed to reveal holistically the peculiarities of state regulation of the language issue in the absence of a legislative framework, which defines the status of languages in the Republic up to 1989. It was clarified the trends of national school development on the territory of Ukraine, the formation of classes with the Russian language of teaching, as well as justification of the Soviet political figures of the prospects of studying the Russian language. It has been summarized the available scientific achievements of domestic and foreign researchers (including Russian) on the problem of the research. It has been identified a legitimate intensification of the Soviet party and state authorities in the processes of russification of society at the end of the 1970s – the beginning of the 1980s. It has been emphasized the consequences of the russification policy at the present stage and indicated the relevance of further research in this direction.

**Key words:** russification, document, legal and regulatory acts, education, language, judgement, order.

## НОРМАТИВНО-ПРАВОВЕ ВРЕГУЛЮВАННЯ МОВНОГО ПИТАННЯ В РАДЯНСЬКІЙ УКРАЇНІ (1964 – 1985): НАУКОВО-ОСВІТНІЙ АСПЕКТ

**Анотація.** Комплексний аналіз нормативно-правової бази, що стосувалася врегулювання мовного питання на території УРСР, а також вивчення її впливу на процеси русифікації у науково-освітній сфері є головною метою цієї статті. **Методологічну основу** дослідження становить комплекс загальнонаукових, спеціально-історичних та міждисциплінарних методів, які дають змогу комплексно розкрити проблему наукового пізнання. Стаття базується на принципах історизму, об'єктивізму, логічності та наступності. **Наукова новизна** полягає у тому, що вперше систематизовано комплекс джерел, які засвідчували русифікацію в освітній та науковій галузях Радянської України. Введено до наукового обігу нові документальні свідчення щодо радянської мовної політики. **Висновок.** У дослідженні висвітлено основні нормативно-правові документи, які засвідчили русифікацію в освітній та науковій сферах. Встановлено особливості реалізації мовної політики в усіх школах УРСР. Детальний аналіз архівних матеріалів уможливив цілісно розкрити особливості державного регулювання мовного питання при відсутності законодавчої основи, яка визначала статус мов у республіці до 1989 р. З'ясовано тенденції розвитку національних шкіл на території України, формування класів з російською мовою викладання, а також обґрунтування радянськими політичними діячами перспектив вивчення російської мови. Узагальнено наявні наукові здобутки вітчизняних та зарубіжних дослідників (у тому числі й російських) стосовно проблеми дослідження. Виявлено закономірну активізацію радянських партійних і державних органів влади у процесах русифікації суспільства наприкінці 1970-х – початку 1980-х рр. Підкреслено наслідки русифікаційної політики на сучасному етапі та наголошено на актуальності подальших досліджень у цьому напрямі.

**Ключові слова:** русифікація, документ, нормативно-правові акти, освіта, мова, постанова, наказ.

**The Problem Statement.** The paradigm of russification processes on the territory of Soviet Ukraine was clearly expressed and dynamic. The anti-Ukrainian slogans, the rejection of the mother tongue, the forced russification of the eastern region of Ukraine and the Crimea, have dealt a heavy blow to the Ukrainian self-identification and linguistic and cultural development. In the context of total control of the party nomenclature over the leading spheres of life activity of the peoples of the USSR, especially for the Ukrainians, which are the titular nation of the republic, it is necessary to trace and single out the basic normative legal and regulatory acts that contributed to the russification of the Ukrainian-speaking population and the linguistic and cultural assimilation of the peoples of the Soviet Union.

**The Analysis of Recent Researches and Publications.** Under modern conditions of research, the problem of russification in Ukraine is relevant. It is reflected in the publications of domestic and foreign scientists. Domestic researchers focused on the problems of displacement of the Ukrainian language from official record keeping, the replacement of the

Ukrainian words with the Russian correspondences, and substantiated the consequences of russification in the 1960s – 1980s for modern state-building. These issues were reflected in the works of L. Masenko (Masenko, 2005), M. Parakhina (Parakhina, 2014), S. Shevchenko (Shevchenko, 2015), Zh. Shevchuk (Shevchuk, 2001), M. Yarmolenko (Yarmolenko, 2013) and the others. In turn, V. Kulyk noted the influence of the Soviet policy of russification on the current language situation (Kulyk, 2014). For the most part, the Russian researchers denied the total nature of russification in the USSR, noting that the use of the Russian language as a primary means of inter-ethnic communication was driven by communication needs. This view was held by A. Miakshev (Miakshev, 2017), S. Cheshko (2000) and the others. In particular, in the context of assimilation processes, the language issue in the USSR was considered by scholars from Europe, the USA, Canada, in particular Z. Wojnovski (Wojnovski, 2015), T. Weeks (Weeks, 2012), P. Kolstø (Kolstø, 2008) and others. The change of linguistic identity during the Soviet period has negative consequences for the modern state-building of Ukraine. G. Sasse and A. Lackner noted that the language was a factor of the Russian aggression (Sasse & Lackner, 2018). However, the legal and regulatory basis of the Soviet government's russification policy needs a more detailed study.

A comprehensive analysis of the legal and regulatory framework for the settlement of the language issue on the territory of the USSR, as well as a study of their influence on the processes of russification in the scientific-educational sphere is the main **purpose of this article**.

**The Results of the Research.** The russification of the Ukrainian society in the Soviet realities was total in nature, as evidenced by a series of studies and archival materials. At the same time, the legitimacy of linguistic and cultural assimilation on the territory of Soviet Ukraine should be questioned due to the lack of legislative regulation of the language issue. A. Fomin, despite his pro-Russian stance on the study of this aspect, nevertheless noted that from the point of view of the Soviet law russification was illegitimate, explaining it by the absence in the Constitution or legislative acts of provisions on the state status of the Russian language (Fomin, 2003, p. 49). A similar point of view was held by the Russian researcher S. Cheshko, who claimed that the official status of the Russian language had not been fixed, but that it performed the functions of the state language because it was derived from communication needs (Cheshko, 2000, p. 165). However, russification was carried out at the expense of the adoption by the executive authorities of normative legal acts that approved bilingualism, as well as due to the ideological justification of linguistic scholars by the identity of the Russian and Ukrainian by distorting the facts and changing the Ukrainian words and terms to the Russian correspondents. It was emphasized by domestic scholars who proved the fact of total russification both at the state and domestic levels.

The foreign scholars as Ph. Krämer, U. Vogl and L. Kolehmainen argued that the language making process is in constant development (Krämer, Vogl & Kolehmainen, 2020, p. 3). The policy of state institutions has a significant impact on the language sphere. We note that during the Soviet period there was a certain process of language formation aimed at unification and further Russification of society. Its implementation involved not only the influence of political but also linguistic ideology, which was developed by the Soviet party figures. In democratic society, it meant collective attitudes that form "speakers' relationships to their own and others' languages, mediating between the social practice of a language and the socioeconomic and political structures within which it occurs" (Cavanaugh, p. 52). In the Soviet times, Russian was supposed to be the main means of communication. At the

same time, the Soviet leadership took measures to eliminate the use of the other so-called, “unpromising languages”, including Ukrainian.

A well-planned russification of the Ukrainian-speaking population of the USSR began in the 1930s. Further linguistic tendencies on the territory of the republic were intended to destroy the positive achievements of the Ukrainian scholars in the lexicological, grammatical and phonetic fields. The Russian language began to dominate in the scientific and educational space, business, publishing sphere and everyday communication. The numerous rulings, directives and orders of the top party leadership only exacerbated the oppressed position of the Ukrainian language, while discrediting the great amount of languages of national minorities living in the Soviet Union. Thus, by strengthening the ground for the total russification of the USSR, the party nomenclature began to take measures for a smooth but purposeful entry of the Russian language into the life of the Ukrainian people.

The first steps to russification after the beginning of the “thaw” began with the adoption of the resolution “On strengthening the connection between school and life” in 1958, and after XXII Congress of the CPSU, during which, M. Khrushchev emphasized the importance of the Russian language for the development of the Communist society (Yarmolenko, 2013, p. 366). These trends intensified in the period of “stagnation”, especially in the field of education and science, which is reflected in the number of documents of legal character. Thus, according to the Order of the Ministry of education of the Ukrainian SSR Nr 8 of 14–17 December 1964 in Luhansk Pedagogical Institute it was held the Republican scientific conference on the Russian-Ukrainian linguistic relations, convened by the Ministry of education of USSR and A. A. Potebnia Institute of linguistics of the Ukrainian Academy of Sciences of USSR. The conference was attended by linguists, researchers of the Institute of linguistics of the Ukrainian Academy of Sciences, professors in linguistics departments of Luhansk, Kherson, Kyiv, Nizhyn, Rivne, the Crimea, Lutsk, Ivano-Frankivsk Pedagogical Institutes and Kyiv, Dnipropetrovsk, Kharkiv, Odesa Universities, representatives from Voronezh Pedagogical Institute and University and also school teachers from the city of Luhansk (Central State Archives of Public Organizations of Ukraine – CSAPOU, f. 166, d. 15, c. 4444, p. 18). The purpose of this conference was the decision of problems of the Russian-Ukrainian linguistic relations, the assimilation and merger of the Ukrainian language to the Russian sample in higher and secondary schools through the development of new methods of teaching lexicological structure of linguistic research. As a result of work of scientific conference of Department of educational, methodical and scientific work was entrusted to direct corresponding recommendations in relation to the assimilation of the Ukrainian language to Russian to all linguistic departments of pedagogical institutes and regional institutes to improve the qualifications of teachers of the relevant specialization (CSAPOU, f. 166, d. 15, c. 4444, p. 19).

According to the plan of the Ministry of Education of the USSR for 1968, and in order to improve the qualification of teachers of Ukrainian and Russian, by the Order No. 134 of June, 24, 1968 it was implemented a seminar on 10-12th September 1968 at Kherson Pedagogical Institute for the development of teacher’s stylistics of the Ukrainian and Russian languages, at the expense of Kherson Pedagogical Institute (CSAPOU, f. 166, d. 15, c. 6264, p. 22). Such seminars aimed to ideologically engage pedagogical staff for in-depth lexicological work among schoolchildren and student youth. With the help of simulation, simplification of some letters and the use of sounds in Russian, the Ukrainian language began to identify with Russian, which, in turn, highlighted the interference of the party nomenclature in the

structure and lexicological composition of the language. This situation stimulated the spread of russification not only in the language sphere, but also among the masses of the masses, who, to a greater extent, had only completed primary and secondary school education or were not literate at all.

Russification of the scientific and educational sphere embraced not only the Ukrainian-language school, its detrimental effect can be traced by analyzing the orders of the Ministry of education of the USSR, which dealt with the language of the ethnic groups living on the territory of the Soviet Union in the 1960s – 1980s and, in accordance with school curricula, deprived of the opportunity of learning the basic school subjects in their native language. Party nomenclature was of the opinion that a thorough study of the Russian language is a vital factor for a comfortable stay numerous nationalities in the Soviet Union. Lay on the Russian language the role of a consolidating factor for the peoples of the Republic, quite a significant role was given to the teaching of Russian in national schools.

According to the decree of the CPSU Central Committee and USSR Council of Ministers dated November, 10 1966 No. 864 at schools of national minorities, located in the countryside, and consisted of more than 25 students of 4–8 classes, the lessons of the Russian language was divided into two subgroups (CSAPOU, f. 166, d. 15, c. 8677, p. 2). This innovation provided better perception of the information by the students and facilitate the work of the teacher, giving him the opportunity to focus on children while learning new academic material. The Ministry of education of the USSR appealed to the Council of Ministers of the USSR with a proposal to implement an appropriate division of classes into subgroups in urban schools with the Hungarian and Moldavian languages teaching (CSAPOU, f. 166, d. 15, c. 8677, p. 2). The argument for this decision was the lack of speaking environment in the region that worsened academic performance at the national schools. Noting that in the USSR there are 28 schools in the town with Hungarian and Moldavian as the language of instruction, which includes classes 204 pupils requiring separation of the individual subgroups in the study of the Russian language. In Transcarpathian region there are 17 such schools, 127 classes; in Chernivtsi region there are 9 schools, 66 classes; in Odesa region – 2 schools and 10 classes. Accordingly, there is an additional need for highly qualified teachers, which accounted for 35 additional rates for teachers in grades 4–8 (CSAPOU, f. 166, d. 15, c. 8677, p. 3).

The Order of the Minister of Education of the USSR No. 14 of January, 20, 1969, approved for 1969/1970 school year a program for schools with the Hungarian language teaching, which included studying in IV–X classes of the Russian language and literature (CSAPOU, f. 166, d. 15, c. 6760, p. 71). The approval of these programmes was justified by the Soviet scholars and political figures as a necessity for the educational development of students, regardless of their ethnic origin. In school programmes, it was emphasized that Russian was a means of inter-ethnic communication, and its study was encouraged, emphasizing its prospect in future life (CSAPOU, f. 166, d. 15, c. 8880, pp. 2–3). This form concealed the grounds for russification, since speakers of Russian had opportunities for rapid career growth (Kolstø, 2008, p. 161).

Further russification of schools of ethnic groups is demonstrated by the Order of the Minister of Education of the USSR No. 42 of February, 28, 1973 “On the opening of preparatory classes in comprehensive schools with the Hungarian and Moldavian languages of teaching of the Ukrainian SSR” (CSAPOU, f. 166, d. 15, c. 8553, pp. 142–143). This document was intended to open in 1973/1974 278 preparatory classes in Hungarian and Moldavian schools of instruction; the appointment of teachers of these classes who are fluent

in Russian; conducting two-week preparatory courses for primary school teachers of national schools; providing elementary school students with the manuals “The Russian language in pictures” of I. Barannykov; the management of the schools and the Research Institute of Pedagogy were instructed to prepare a draft curriculum and programs for the preparatory classes of the national schools (CSAPOU, f. 166, d. 15, c. 8553, p. 142).

According to the Order of the Council of Ministers of Ukrainian SSR № 242 dated January, 7, 1974, “On the division of classes into groups in the schools of the city type with the Hungarian and Moldavian languages of studying during the study of the Russian language” at schools with Hungarian and Moldavian languages of studying increased the number of hours of the Russian language studying, opened a special preparatory classes, renewed the material and technical base of educational institutions, including professionally trained teaching staff and created language laboratories (CSAPOU, f. 166, d.15, c. 8677, pp. 2–3). The last type of training was aimed to create for students a favorable communication environment with the individual needs for improved spoken language.

The implementation of the policy of total russification illuminates the decree of the CPSU Central Committee and USSR Council of Ministers dated June, 20, 1972 “On the completion of the transition to universal secondary education of youth and the further development of secondary schools” (CSAPOU, f. 166, d. 15, c. 8788, pp. 108–109). This resolution was intended to improve the conditions for teaching the Russian language in national schools, to complete the transition to new curricula and plans to introduce a certification of teachers (the Development of education...) and start the publishing house of the Republican scientific and methodical journal “The Russian language and literature in schools of the USSR” (CSAPOU, f. 166, d 15, c. 8976, p. 79), which aimed to improve the Russian language teaching, to explain the differences in the pronunciation of the Russian and Ukrainian phrases, spreading at the same Communist slogans through a network of primary and secondary school education.

In 1978 the Council of Ministers of the USSR adopted the decree “On measures on further improving the study and teaching of Russian language in the Ukrainian SSR”. This document included the following tasks: in 1979 – 1983 to implement measures for further improvement of existing programs, textbooks and manuals in the Russian language for schools with Ukrainian, Moldavian, Hungarian and Polish; to increase the production of literature for children in Russian; beginning with the 1980/1981 year to implement the study of the Russian language in the first classes of comprehensive schools with the Ukrainian language of studying; to implement the classes with a number of students more than 25 people into two groups for a more detailed study of the Russian language at national schools of the Ukrainian SSR; to provide higher, secondary and specialized technical institutions highly qualified teachers of the Russian language and literature; to increase the number of teachers of the Russian language in universities and teacher training institutions to ensure the scientific and educational needs of the residents of the Soviet Union and the satisfaction of their aspirations for language learning the all-Union communication; until 1980 to develop a new curriculum for the specialty “The Russian language and literature at schools with the Ukrainian language of instruction”, which provided an in-depth study of the Russian language for future teachers of this specialization is to expand the training of graduate students, who study the Russian language and literature, and to improve the methodology of teaching these subjects; to create, from January, 1, 1979 at the Scientific and Research Institute of Pedagogy of the USSR Ukrainian sector of methodology of the Russian language and literature; to increase material and technical base of educational institutions for in-depth study of the

Russian language; to expand the teaching of basic courses in the Russian language; take note, the Council of Ministers resolution of October, 13, 1978 No. 835 “On measures for further improving the study and teaching of Russian in the Union republics” was commissioned to create new curricula, textbooks and manuals for learning the Russian language in national schools, implementing an in-depth study of the Russian language in educational institutions for persons of non-Russian nationalities increased the number of students and the territory of the RSFSR, the Ukrainian SSR and the Bielorrussian SSR on specialty “The Russian language and literature” (CSAPOU, f. 166, d. 15, c. 8975, pp. 153–156). This decision deepened the russification of the Ukrainian society, and also provided significant pressure on the scientific and educational sector in general and lexicology the field as a whole. The Ukrainian language was equal to the second-rate languages of the Soviet Union and was not cost-effective for further use in scientific field and everyday communication. The increase in the number of teachers of the Russian language had a negative impact on the ordinary Ukrainian citizen, because all main subjects were taught in Russian. Children and teenagers are taught not just the Russian language and literature, but also designed for the younger generation the principles of education and values inherent in the Russian people, levelling in the original Ukrainian traditions, including the language of everyday communication.

The testimony of graduation and distribution of specialists who graduated in 1978 from higher education institutions of the Ministry of Education of the USSR illustrates a significant increase in the number of teachers of the Russian language and literature in the number of 2620 people as opposed to 1780 teachers who chose the specialty “The Ukrainian language and literature” (CSAPOU, f. 166, d. 15, c. 8976, p. 33). According to the letter of the Ministry of Education of the USSR No. 115–388 / 12 of October 12, 1978, the Ministry of Education of the USSR developed a proposal for the preparation of the Russian language teachers for Ukrainian, Moldovan and Hungarian schools in connection with the division of classes into subgroups and increased demand for teaching staff in this specialty (CSAPOU, f. 166, d. 15, c. 8976, p. 43). According to the order, the additional need for teachers of Russian language and literature in 1979 was 1870 people, in 1980 – 1970, 1981 – 2080, 1982 – 1983 – 2130, 1984 – 2580, 1985 – 2660 teachers of the Russian language and literature. The total number of additional teaching staff in 1981 – 1985 was 11580 specialists, which had to meet the needs of the Soviet Union to study the Russian language at schools of the Ukrainian SSR with full-time teaching subjects (CSAPOU, f. 166, d. 15, c. 8976, p. 44). Learning Russian in grade I–III became a prerogative for elementary school teachers. This innovation required additional training in 1982 – 1983 by five hundred teachers in this specialty (CSAPOU, f. 166, d. 15, c. 8976, p. 45).

In connection with the division of classes into subgroups, for advanced study of Russian language and literature at schools of national minorities, the Ministry of education of Ukraine has introduced a special training for the I – III IV – VIII and IX – X classes. Accordingly, the teaching hours of teachers was distributed to the city and the village. Average weekly load of teachers of the Russian language in national schools of the Republic in the fourth grade was 22–23 hours in the cities and 20–22 hours in the villages of the Ukrainian SSR, as of this year, 1978 – 1990 (CSAPOU, f. 166, d. 15, c. 8976, p. 46).

Further improvement of the system of national education in the Soviet Union stimulated an accelerated study of the Russian language, in turn nullifying the achievements of the Ukrainian linguistics in general and schooling in particular. The letter of the Ministry of education of the USSR to the first Deputy Minister F. Panachin, No 075-420/16 of November,

14, 1978, provides information for the Ministry of education of the USSR about the status and actions carried out by the Soviet leadership to improve the study of the Russian language and literature at national schools, secondary and higher educational institutions of the USSR on behalf of the Deputy Minister M. Fomenko (CSAPOU, f. 166, d. 15, c. 8976, p. 76). In particular, this document emphasizes the compulsory study of the Russian as the lingua Franca for many peoples of the USSR. The Soviet leadership openly advocated assimilation to the Russian and Ukrainian languages through the school curriculum and textbooks. This type of learning materials offered to students to find similarities in spelling and pronunciation of two “closely related languages”, which, in turn, were intended to prevent and eliminate spelling inconsistencies which arose as a consequence of interference, that is, the pernicious influence of one language on another (CSAPOU, f. 166, d. 15, c. 8976, p. 77).

Thus, according to the order of the Ministry of education of the USSR for schools with the Moldovan and Hungarian language of instruction were developed 19 books for advanced study of the Russian language (CSAPOU, f. 166, d. 15, c. 8976, p. 78), this situation indicates a total wave of russification, which covered the whole of the nation living on the territory of the Soviet Ukraine of that time.

For teachers-linguists was published educational and methodical literature which over the content and building the grammatical structure of the language negates the achievement of the Ukrainian linguistics of the 1920s. To the list this type of educational materials should include: the works of “The Russian language is a means of international communication and the unity of the peoples of the USSR”, “The Russian language as a source of enrichment of the peoples of the USSR”, “The Russian speech culture in Ukraine”, “Comparative grammar of the Russian and Ukrainian languages”, “The ways of improvement of the Russian language teaching at secondary schools of the Ukrainian SSR”, “The Russian language study in the 4th grade schools with the Ukrainian language of instruction”, “Collection of dictations on the Russian language”, “Teaching material in Russian for grades 4–6 schools with the Hungarian and Moldavian language learning”, “Didactic material on the Russian language for grade 5 of schools with the Ukrainian language of instruction”, “Collection of texts for summaries in grades 4–8 of schools with the Ukrainian language of instruction”; collections of dictations, materials for language development for grades 1–10 of schools with the Hungarian and Moldavian language teaching, courses of modern Russian language for the pedagogical institutes, Russian-Ukrainian and Ukrainian-Russian monolingual and phraseological dictionaries (CSAPOU, f. 166, d. 15, c. 8976, p. 78). In 1979, for printing there were prepared the materials that were collated and compared to the stylistic composition of the Ukrainian and the Russian language, this type of educational literature includes these works: “Comparative stylistics of the Russian and Ukrainian languages”, “Teaching Russian at schools of the Ukrainian SSR”, “Peculiarities of the Russian language teaching at schools with the Ukrainian language of instruction” and “The Russian language teaching in grade 7 of schools with the Ukrainian language of instruction” (CSAPOU, f. 166, d. 15, c. 8976, p. 78). For printing and publishing school literature it was created all necessary conditions for the rapid study of the Russian language with the help of a network of school education. At that time the languages of other peoples of the USSR lost any value and gradually but steadily removed from the consumer. The new materials helped the teachers to develop the Russian pronunciation of the students of elementary and middle school. At schools there were created libraries and offices of the Russian language (CSAPOU, f. 166, d. 15, c. 8976, p. 79). In general, in the UkrSSR operated 17 schools and classes with advanced study of the

Russian language and literature (CSAPOU, f. 166, d. 15, c. 8976, p. 80). In 1980/1981 this year it was planned to introduce the study of the Russian language, starting from grade 1 in schools with the Ukrainian language of instruction (CSAPOU, f. 166, d. 15, c. 8976, p. 83).

Despite this, the disadvantages in studying Russian still existed. According to the party nomenclature, insufficient attention was paid to the formation of verbal pronunciation of students, which in some cases led to confusion of words and the spread of mixed Russian-Ukrainian dialect, especially among elementary students. Nevertheless, the quality of the Russian language and literature teacher training at higher educational establishments of the republic improved. A large number of students studied Russian at the departments of Kyiv, Zaporizhia, Drohobych and Voroshylovhrad Pedagogical Institutes. The scientific and educational work of the departments focused primarily on the study and comparison of the Ukrainian and Russian languages, the solution of the bilingual problem and the study of the phonetic composition of both languages (CSAPOU, f. 166, d. 15, c. 8976, p. 81). To consolidate the achievements of the Soviet linguistics, the Ministry of Education of the USSR planned to create in 1979/1980 supporting departments of the Russian language at Kyiv, Voroshylovhrad, Zaporizhia Pedagogical Institutes (CSAPOU, f. 166, d. 15, c. 8976, p. 84) and Donetsk, Kyiv, Lviv, Odesa Universities (CSAPOU, f. 166, d. 15, c. 8975, pp. 153–156).

At the same time, some privileges were granted to the graduates of Moldavian schools of the Ukrainian SSR in 1976 – 1980. In particular, this included the out-of-competition admission to Chernivtsi University, which required 102 highly qualified specialists in specialties each year: the Russian language and literature for 30 Moldavian schools; the Moldavian language – 3; French – 3; History – 14; Mathematics – 20; Physics – 15; Chemistry – 6; Biology – 6; Geography – 5 teachers of the national school (CSAPOU, f. 166, d. 15, c. 8975, pp. 153–156).

The language issue in the USSR at the legislative level was settled only after the adoption in 1989 of the Law on the Languages of the USSR, which reflected the status of the Ukrainian language as a state language and Russian as a language of international communication. However, the legal basis of the russification of the society formed by the legal acts caused the loss of linguistic and cultural self-identification of a considerable part of the Ukrainians, in particular in the south-eastern regions of Ukraine, which in turn affected the marginalization of society, and also became the basis for the Russian aggression.

**The Conclusion.** Thus, after analyzing the legal and regulatory framework, which would regulate the language issue, it is worth noting that the Soviet government implemented a series of measures aimed at russification, at the same time, ignoring the possibility of legislative approval. In general, the documents adopted by the Council of Ministers of the USSR and the Ministry of education of the USSR included the planned introduction of the Russian language in all educational and scientific institutions. Consequently, this shaped the public reception of the prestige of the Russian language and its study prospects for career growth, which also affected the change in identification. Further research in this direction is highly relevant, given the current social problems in Ukraine. Therefore, the leading role in future researches of scholars will have the study of historical background of the Russian aggression in the Crimea and Donbas in the context of the Soviet policy of russification.

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**MATVIY STAKHIV AND THE PROJECT OF THE ENGLISH EDITION  
OF TEN-VOLUME “HISTORY OF UKRAINE-RUS”  
BY MYKHAILO HRUSHEVSKY (1973 – 1977)**

**Abstract.** *The purpose of the research is to find out the role and participation of Matviy Stakhiv in the attempts to translate and publish in English ten-volume “History of Ukraine-Rus” by M. Hrushevsky. The methodological basis of the research is based on implements that should ensure maximum objectivity and reliability of the obtained scientific results. There are three main groups of scientific knowledge methods: general, general and special, as well as scientific principles (historicism, objectivity, comprehensiveness, continuity). The study is based on the chronological and problematic principle. Taking into account the subject of the study, the following types of comparisons have been used: historical and typological – to analyze various processes with common features and characteristics,*

and historical genetic to illustrate historical facts in close connection with the historical situation in which they arose. **The scientific novelty** of the article is an attempt to comprehensively analyze the initiatives of individual representatives of scientific centers of the Ukrainian diaspora to bring to the world, in the language of international communication, ten-volume "History of Ukraine-Rus" by M. Hrushevsky, which is a kind of "passport" of the Ukrainian people. For the first time, the role and active participation of M. Stakhiv in the attempt to acquaint wide scientific circles of the English-speaking world with this fundamental work on the history of Ukraine have been considered in detail. **The Conclusions.** The case of translation and publication of ten-volume "History of Ukraine-Rus" of Hrushevsky" by the Section of History of Ukraine ShSS headed by M. Stakhiv took place at the appropriate level at the initial stage. Qualified translators, professors from American and Canadian universities, who worked with great enthusiasm, were involved in the work. Much effort and energy was given by M. Stakhiv, who at that time was of a respectable age – on November 30, 1975 he turned 80 years old. Owing to the Ukrainian diaspora, a significant financial base was raised for the publication of this fundamental work in English. The whole community, which sought to implement this idea, deeply believed that they were doing some important work to spread the Ukrainian historical science in the English-speaking world. However, at the final stage, the process of publishing the English-language edition of "History of Ukraine-Rus" by M. Hrushevsky was stopped under the pressure of resistance from some figures of the Ukrainian diaspora for one reason or another.

**Key words:** M. Stakhiv, M. Hrushevsky, Scientific Shevchenko Society (ShSS), "History of Ukraine-Rus", diaspora.

## МАТВІЙ СТАХІВ І ПРОЄКТ АНГЛОМОВНОГО ВИДАННЯ ДЕСЯТИТОМНОЇ "ІСТОРІЇ УКРАЇНИ-РУСИ" МИХАЙЛА ГРУШЕВСЬКОГО (1973 – 1977)

**Анотація. Мета дослідження** – полягає у тому, щоби з'ясувати роль та участь Матвія Стахів у спробах перекладу і виданні англійською мовою десяти томної "Історії України-Руси" М. Грушевського. **Методологічне підґрунтя** роботи базується на інструментарії, який повинен забезпечити максимальну об'єктивність та достовірність одержаних наукових результатів. Застосовано три головні групи методів наукового пізнання: загальні, загальнонаукові та спеціальні, а також наукові принципи (історизму, об'єктивності, всебічності, наступності). Дослідження побудоване за хронологічно-проблемним принципом. Беручи до уваги предмет дослідження, використано такі види порівнянь: історико-типологічне – для аналізу різноманітних процесів зі спільними рисами й ознаками, та історико-генетичне, щоб показати історичні факти в тісному зв'язку з тією історичною ситуацією, у якій вони виникли. **Наукова новизна** статті полягає у спробі комплексного аналізу ініціатив окремих представників наукових осередків української діаспори донести до світової громадськості, мовою міжнародного спілкування, десяти томну "Історію України-Руси" М. Грушевського, яка є свого роду "паспортом" українського народу. Вперше детально розглянуто роль та активну участь М. Стахів у намаганні ознайомити з цією фундаментальною працею з історії України широкі наукові кола англomовного світу. **Висновки.** Справа перекладу й видання десяти томної "Історії України-Руси Грушевського" Секцією Історії України НТШ на чолі з М. Стахівим на початковому етапі проходила на належному рівні. До роботи було залучено кваліфікованих перекладачів, професорів американських і канадських університетів, які працювали з великим ентузіазмом. Чимало зусиль та енергії цій справі віддавав М. Стахів, який на той час мав поважний вік – 30 листопада 1975 р. йому виповнилось 80 років. Також завдяки українській діаспорі було зібрано значну фінансову базу для видання цієї фундаментальної праці англійською мовою. Уся спільнота, яка прагнула втілити в життя цю ідею, глибоко вірила, що вони виконують частину важливої роботи для поширення української історичної науки в англomовному світі. Однак на завершальній стадії процес англomовного видання "Історії України-Руси" М. Грушевського під тиском спротиву з боку окремих діячів української діаспори з тих чи тих причин було припинено.

**Ключові слова:** М. Стахів, М. Грушевський, Наукове товариство імені Шевченка (НТШ), "Історія України-Руси", діаспора.

**The Problem Statement.** Under modern difficult socio-political conditions for Ukraine, the historical and scientific foundation that was laid by our great scholars and historians in the past centuries is important. Owing to M. Hrushevsky and his ten-volume “History of Ukraine-Rus’”, the Ukrainian people, during the hostile large-scale Russian invasion, can convey its historical identity to the world, to show their independent ethno and nation-genesis, their state-building achievements. Not in vain, in the last century, M. Stakhiv tried to acquaint the world community with a real history of Ukraine hoping to get proper support from it. Therefore, we must continue to acquaint wide public circles with our history based on the fundamental work of M. Hrushevsky.

**The Analysis of Recent Researches and Publications.** M. Stakhiv’s organizational activity is reflected in the memoirs of his students, comrades and members of public organizations in exile. Petro Stercho, a student of M. Stakhiv, in the work “On Publication of History of Ukraine-Rus’ by M. Hrushevsky in English”, highlighting the main reasons, which became an obstacle to the publication of the English-translated volumes of “History of Ukraine-Rus’”, at the same time gave some respect to M. Stakhiv’s activity in this matter (Stercho, 1984, p. 239). Ivan Kedryn wrote some memoirs about the role of M. Stakhiv in the creation of the Section of History of Ukraine and organization of work on the translation of M. Hrushevsky’s work (Kedryn, 1976, p. 585).

L. Sakada, modern Ukrainian researcher, mentions about the unfulfilled idea of the English translation of “History of Ukraine-Rus’” in the mid-60’s of the XXth century (Sakada, 1996, p. 40). The discussion that took place at that time among the Ukrainian scientific diaspora regarding the translation of M. Hrushevsky’s work is covered in N. Marchenko’s work “The Centennial Jubilee of Mykhailo Hrushevsky in the Pages of Diaspora Periodicals”. The author noted that some Ukrainian scholars of that time shifted the discussion of this problem from the scientific to political level and emphasized the need for a new study of the history of Ukraine in English (Marchenko, 2013, p. 191).

**The purpose of the research** consists in finding out the role and participation of Matviy Stakhiv in the attempts to translate and publish in English ten-volume “History of Ukraine-Rus’” by M. Hrushevsky.

**The Results of the Research.** As a great follower of the historical scheme of Mykhailo Hrushevsky, Matviy Stakhiv worked with great enthusiasm during the last years of his life, within the Section of the History of Ukraine of the Shevchenko Scientific Society (ShSS), on the translation of the ten-volume “History of Ukraine-Rus’” in English (Nadtytsianskyi, 1979). He carried out this work as the director of the Section and the chairman of the Commission of the English-language edition of ten-volume “History of Ukraine-Rus’” by M. Hrushevsky (Stercho, 1985, p. 893).

At the second General Meeting of the Section of History of Ukraine, which took place on June 29, 1974 in New York, Matviy Stakhiv was elected the director of the Section. Back in the spring of 1973, the Directorate of the Section approved a project for the immediate publication of the English translation of M. Hrushevsky’s ten-volume History of Ukraine-Rus’. This publication was supported by the Presidium of the General Council of the ShSS and the ShSS Board in the United States of America (USA). A separate press release was issued on this occasion, and the plan was recommended for approval at the Scientific Congress dedicated to the 100th anniversary of the ShSS (NTSh v ZSA. Biuletyn, 1977). In turn, the Jubilee Congress of the Century of ShSS adopted a resolution stating that the next and most important task of ShSS at that stage is to publish the English translation of the ten-volume

“History of Ukraine-Rus” by M. Hrushevsky. In the resolution there was also the request to the Ukrainian community for material and moral assistance in this important matter and there was some gratitude to the members of the ShSS for their active and selfless participation in this difficult work (Stercho, 1984, p. 239).

It should be noted that the idea of translating “History of Ukraine-Rus” by M. Hrushevsky into English appeared among the Ukrainian diaspora at the beginning of the 60s of the XXth century. This idea encompassed initiative scholars, the Ukrainian citizens-patrons and various scientific institutions in the diaspora, including the Ukrainian Historical Society (UHS). However, at some point there were some difficulties, as some scholars, including Prof. Omelian Pritsak, expressed opinions against the publication of the English-language “History of Ukraine-Rus”, and tried to downplay the scientific significance of this fundamental work and argued about the alleged “obsolescence” of History. This was noted in O. Pritsak’s article “In the Century of Birth of M. Hrushevsky”, which led to the emergence of skeptics in English circles of the English-language project “History of Ukraine-Rus” (Pritsak, 2007, p. 187). As for the UHS, at that time it lacked the necessary resources to start working on the publication (Vynar, 2002, p. 269). A similar opinion was held by Oleksandr Dombrovsky, the Ukrainian scholar, historian, member of the ShSS in exile, who noted that half a century passed since M. Hrushevsky wrote “History of Ukraine-Rus”, and during that time new archaeological discoveries were made, which brought a lot of new material. At the same time, he emphasized that many achievements were made in the field of auxiliary historical sciences, which clarified some issues of ancient history of Ukraine. In addition, O. Dombrovsky noted that the translation required large financial costs and the involvement of a significant number of highly qualified translators and historians (Dombrovskyi, 1968, pp. 139,141).

On July 17, 1974, the Second General Meeting of the Section of History of Ukraine at the ShSS decided to establish a Commission for the English-language edition of the ten-volume “History of Ukraine-Rus” by M. Hrushevsky. Prof., Dr. M. Stakhiv was elected a chairman of the commission, Secretary – Prof., Dr. Petro Stercho. The chairman of the ShSS in the USA Dr. Oryp Andrushkiv, Scientific Secretary of the ShSS in the USA Dr. Mykola Chyrovsky, Senator of the Canadian Parliament, Prof. of History at the University of Ottawa Pavlo Yuzyk, Prof., Dr. Lev Dobriansky, Prof. Dr. Meletius Voinar, Prof., Dr. Hryhor Luzhnytsky, Prof., Dr. Volodymyr Stoyko and Dr. Ivan Novosivsky were the members of the Commission (NTSh v ZSA. Biuletyn, 1977, p. 70). The Commission, together with its head, argued that “History of Ukraine-Rus” was a national scientific metric of the Ukrainian people, that is why, they considered it essential to publish this translation and spread it in the English-speaking world. According to them, the distribution of this publication will help to acquaint the English-speaking scholars, students and the general public with the objective history of Eastern Europe, and especially with the history of Ukraine (Visnyk sektsii, 1974, pp. 5–9).

For the organizational work of the Commission, the so-called “rulebook” or recommendations on the process of preparation for publication of the English translation of the work by M. Hrushevsky were elaborated (NTSh v ZSA. Biuletyn, 1977, p. 65). According to the approved “rulebook”, the Commission was given the appropriate tasks: to prepare for each volume supplements in the form of bibliography, including publications in Western European languages, of those scientific works that touched upon this volume “History of Ukraine-Rus”, which appeared after the last author’s edition; to invite qualified English translators and draft project agreements with them and with the Directorate confirmation;

to involve the relevant Sub-Commissions to consider the terminology in the translation and to supplement the mentioned above bibliography; to take measures to raise funds for the publication of this work (Visnyk sektsii, 1974, p. 5).

The English-language Edition Commission set up two subcommissions – Terminology, and Transliteration, Bibliography. The Terminology Subcommittee was headed by Prof., Dr. Vasyl Lev, and it included Professors Yaroslav Rudnytsky, Hryhor Luzhnytsky, Natalia Pazuniak, Volodymyr Kysilevsky and Bohdan Romanchuk. The Transliteration and Bibliography Subcommittee was headed by Dr. Vasyl Lutsiv, the members of the commission were: Archimandrite Atanas Velyky, Meletiy Voynar, Dr. Izydor Nahaevsky and Dr. Volodymyr Hutsul (NTSh v ZSA. Biuletyn, 1977, pp. 65–66). The translators received recommendations from the Commission on a uniform translation of all volumes. According to the recommendations, the necessary transliteration of the Ukrainian names, geographical names and state institutions should be a prerequisite for translation. As for transliteration in English editions of ShSS, it should be printed in the English alphabet according to the Ukrainian phonetics. Requirements for transliteration were presented in Volume I of English history of Western Ukraine “Western Ukraine at the Turn of European History” by M. Stakhiv and in Volume I of the history of the UPR “Ukraine and the European Uprising in 1911 – 1919” by M. Stakhiv, M. Chyrovsky and P. Stercho (Stercho, 1984, p. 240).

It should be noted that M. Stakhiv, in order to devote himself entirely to this painstaking work, refused to be re-elected Chairman of the ShSS of America and the President in the General Council of the ShSS (Stercho, 1984, p. 239). He also had to face opposition by opponents of the idea of translating “History of Ukraine-Rus” in the midst of preparatory work on the translation. In particular, an ordinary member of ShSS Bohdan Korchmaryk, who in October of 1974, in a letter to M. Stakhiv expressed the opinion that the translation of this work would not explain to the English-speaking readers the peculiarities of the Ukrainian-Russian relations. On the contrary, it will make it even more difficult for them to understand these processes. He also claimed that some facts of the historical past presented by M. Hrushevsky do not correspond to the objective historical truth. To such remarks the chairman of the Commission of the English-language edition, in the form peculiar to him, argued, that the unsurpassed value of M. Hrushevsky’s work consists in the fact that it presents the development of the Ukrainian ethnogenesis and nation-genesis as an independent, original historical process. His next argument was that none of M. Hrushevsky’s students developed or created a different scheme of the Ukrainian history, historical work, which would be equivalent to ten-volume “History of Ukraine-Rus” (Stercho, 1984, p. 249).

The translation of “History of Ukraine-Rus” started in December of 1974. Each volume of this English translation had to be carefully checked by specialists, in particular, the scientific secretary of the ShSS, the chairman of the Commission and a professional English expert. The correction had to be made twice by translators and also by other specialists. P. Yuzyk was invited to test English translation (NTSh v ZSA. Biuletyn, 1977, p. 70). According to the resolution of the Commission, M. Stakhiv and M. Chyrovsky had to check the conformity of the translation with the original. P. Stercho had to check the volume translated by M. Chyrovsky (Visnyk sektsii, 1976, p. 13). The commission planned to complete the translation of the first four volumes of “History of Ukraine-Rus” by the summer of 1976. In October of 1976, the first and third volumes were translated, and the second and fourth were at the final stages. Volume I was translated by M. Chyrovsky, and reviewed by M. Stakhiv and P. Stercho. Volume III third was translated by K. Andrusyshyn, and the reviewers were

M. Stakhiv and M. Chyrovsky. Both volumes were edited by P. Yuzyk and prepared for publication. M. Vynar and Y. Lohush translated Volume II, and P. Stercho translated Volume IV (NTSh v ZSA. Biuletyn, 1977, p. 71). Printing and publishing was to be carried out by a publishing house of one of Canadian state universities (Visnyk sektsii, 1976, p. 13). It should be noted that M. Stakhiv translated the scientific biography of Mykhailo Hrushevsky included into Volume I of this edition (NTSh v ZSA. Biuletyn, 1977, p. 71).

Publishing this monumental history of Ukraine in English was a very valuable affair. Each volume averaged over 600 pages of print. Printing, paper and bookbinding became much more expensive at that time. Publication of maps and illustrations required additional costs. However, the Ukrainian national community was aware that under the conditions of the Soviet occupation of Ukraine and the enslavement of the Ukrainian science, and taking into consideration the growing number of anti-Ukrainian publications of this regime and supporters of its anti-Ukrainian historical doctrine in English-speaking countries, this edition of comprehensive Ukrainian history in English was extremely necessary. Therefore, the Hrushevsky History Publishing Foundation, headed by the ShSS Board in the United States, received significant donations from patrons of the Ukrainian independent historical science (Visnyk sektsii, 1976, pp. 13–14).

A lot of financial effort was made by the chairman of the Commission of the English-language Publication M. Stakhiv. As a member of the Board, or its chairman, he was quite active in strengthening the financial base of the American ShSS. He raised significant funds for his research, which was done by persuading many conscious citizens in the United States and Canada to make monetary contributions to the needs of the American ShSS (Chyrovskiy, 1975).

According to the resolution of the General Meeting, the Directorate of the History Section of Ukraine was directly involved in collecting financial donations for the English-language edition of M. Hrushevsky's work. In particular, M. Stakhiv organized donations to the Hrushevsky Fund of more than 36 thousand US dollars; Prof. Dr. M. Chyrovsky – 7 thousand dollars; Prof. Dr. P. Stercho – 1 thousand dollars and totally for the English edition of Hrushevsky members of the Directorate raised more than 44 thousand dollars. In addition, owing to Matthew Stakhiv, there was received a huge gift for the English-language edition of the history of Ukraine from the entrepreneur and emigrant Dorota Kulchytska in the amount of 92 thousand dollars (NTSh v ZSA. Biuletyn, 1977, p. 68).

Recalling D. Kulchytska, M. Stakhiv noted that: "Already during the first conversation, she became interested in the question of how the ShSS works to spread the truth about Ukraine. I emphasized that ShSS, as the Ukrainian scientific and academic institution independent of other people's factors, can develop only when it has the financial support of its Ukrainian community. She listened to me carefully, and said briefly: "I will probably not forget about ShSS!" Mrs. Dorota Kulchytska really kept her word. Thus, for ShSS there were collected 90 800.00 dollars on four books before she joined the majority!" (Stakhiv, 1985, p. 979).

It is also worth noting the contribution of the former Lviv cooperator and emigrant Ivan Romaniuk in the total amount of 20 thousand dollars, which was received for ShSS owing to the efforts of M. Stakhiv (Visnyk sektsii, 1974, p. 2). At one time, I. Romaniuk bequeathed all his savings to the New York ShSS, where he established his own publishing fund. There is preserved his correspondence with the then president of ShSS, M. Stakhiv, from which we learn that he financially contributed to the translation into English and the publication of ten-volume "History of Ukraine-Rus" in order to draw attention of the world community to the fact of the Soviet enslavement of Ukraine (Romaniuk, 2013). In particular, in a letter to

M. Stakhiv in July of 1970, I. Romaniuk reported that his life was insured by the German company and, if it pays the appropriate money for the property left by him in Lviv, the money will be given to the needs of the ShSS (Romaniuk, 2013).

M. Stakhiv's wife Franka and their son joined the fundraising work for the English-language edition of M. Hrushevsky's work (Stercho, 1985, p. 893). In September of 1976, in the Section of Bulletin of the History of Ukraine there was published a list of names of patrons who donated various sums of money to M. Hrushevsky's "History of Ukraine-Rus'", including the name of M. Stakhiv's son Yaroslav (Visnyk sektsii, 1976, p. 13).

The English-language Commission sought to inform all Ukrainians about the translation and publication of "History of Ukraine-Rus'", that is why, "Voice of America" official federal news agency broadcast a separate audio recording of the publication to Ukraine. And on the morning of December 2, 1974, the then editor Victor Kulyi, for five minutes in detail, informed the Ukrainian listeners of the "Voice of America" about the plan of translation and publication of the work of M. Hrushevsky, emphasizing that this publication is a very important event in the history of the Ukrainian independent science (Visnyk sektsii, 1974, p. 10).

Soon, the members of the English-language Commission finally translated the first, second, third and fourth volumes of "History of Ukraine-Rus'". On November 5, 1977, at the last full meeting of the Commission, at the SShS in New York, it was agreed to sign an agreement with the University of Ottawa Publishing House and to publish the first four volumes. Even cover design options were considered, the cost of each volume and it was proposed to accept orders for all four printed volumes (Stercho, 1984, p. 246).

Unfortunately, the situation with the translation and publication of "History of Ukraine-Rus'" changed dramatically after the election of Yaroslav Padokh as the head of the SShS in America. The SShS did not sign an agreement with the University of Ottawa Publishing House, which had previously agreed to publish "History of Ukraine-Rus'" on the recommendation of Senator P. Yuzyk. Petro Stercho mentions some opponents who could have influenced the failure of this publishing project (Stercho, 1984, p. 245). Also, there is an assumption that O. Pritsak convinced the then head of SShS Ya. Padokh of the inexpediency of the English translation of "History of Ukraine-Rus'" (Vynar, 2002, p. 269).

Thus, we can conclude that the translation and publication of ten-volume "History of Ukraine-Rus' of Hrushevsky" by the Section of History of Ukraine ShSS headed by M. Stakhiv at the initial stage was at a proper level. Qualified translators, professors from American and Canadian universities, who worked with great enthusiasm, and were involved in the work. Much effort and energy was given to this cause by M. Stakhiv, who at that time was of a respectable age – on November 30, 1975 he turned 80 years old. Also, owing to the Ukrainian diaspora, a significant financial base was raised for the publication of this fundamental work in English. The whole community, which sought to implement this idea, deeply believed that they would do some of the important work to spread the Ukrainian historical science in the English-speaking world. However, at the final stage, the process of publishing the English-language edition of "History of Ukraine-Rus'" of M. Hrushevsky was stopped under the pressure of resistance from some figures of the Ukrainian diaspora for one reason or another.

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**CHERNIVTSI PARTY APPARATUS AND RELIGIOUS REVIVAL OF BUKOVYNA  
AT THE END OF THE 80s – THE BEGINNING OF THE 90s**

**Abstract. The Purpose of the Research.** Scientific research reconstructs little-known events related to the peculiarities of the religious “renaissance” of the northern part of Bukovyna in the second half of the 80s – at the beginning of the 90s of the twentieth century, which was the part of the UkrSSR and the USSR from 1940 and 1944 till 1991. Reproduction of the religious revival dynamics is presented through the prism of its communist reception, based on the latent but sympathetic attitude of the pro-Russian Communist Party leadership of Chernivtsi region to the Russian Orthodox Church and the party leadership’s complete rejection of the national Ukrainian Greek Catholic Church (UGCC) and the Ukrainian Autocephalous Orthodox Church (UAOC). **The Methodology of the Research.** The verification of Chernivtsi Communist Party’s negative reception of the religious revival of the national churches has been done in accordance with the principle of historical objectivity. Methods of critical and structural analysis and classification, systematization of unpublished archival sources have been used in the research. The conclusions have been drawn based on documents from three regional archives, as well as the pages of communist and national periodicals and interviews with participants. **The novelty**

*of the research* is that for the first time in the Ukrainian historical science the analysis of the causes and consequences of a dual reception of Chernivtsi party apparatus of the religious situation in the region, due to the party apparatus subordination to Moscow Central Committee of the CPSU, which considered the Russian Orthodox Church (ROCh) as one of the tools for instilling the Russian mentality in the annexed Ukrainian lands. Such analysis made it possible to introduce into scientific circulation a new archival documentary base, which was not previously made public to a wide range of researchers.

**The Conclusions.** In historical science, there is a hypothesis about the selectivity of the Soviet, and therefore Russian, communist doctrine of “militant atheism” as a complete and irrevocable denial of faith in God. Such double standards were evident for the Soviet power during critical period, when, in order to survive, it consciously deviated from its own postulates and adapted them to the demands of time. The last in the “queue” of these manifestations was the period when the CPSU-CPU exhausted itself as the ideological core of the state and the USSR – as a geopolitical object. Then, on the instructions of Moscow, Chernivtsi local party apparatus illustrated the favourable attitude to the ROCh, subsidized magnificent celebration of the 1000th anniversary of the baptism of Kievan Rus-Ukraine in the Orthodox-Russian format and exercised an uncompromising attitude towards the UGCC and the UAOC and the Protestant churches, guided not by religious but political circumstances.

**Key words:** religious revival, the CPSU-CPU, Chernivtsi party apparatus, national and democratic movement, statehood, Ukraine.

## ЧЕРНІВЕЦЬКИЙ ПАРТАПАРАТ І РЕЛІГІЙНЕ ВІДРОДЖЕННЯ БУКОВИНИ НА ЗЛАМІ 80–90-х рр. ХХ ст.

**Анотація. Мета дослідження.** Наукова розвідка реконструює маловідомі події, пов'язані з особливостям релігійного “ренесансу” північної частини Буковини у другій половині 80 – початку 90-х рр. ХХ ст., яка входила до складу УРСР і СРСР від 1940 і 1944 рр. до 1991 р. Відтворення динаміки релігійного відродження подано крізь призму його комуністичної рецепції, що ґрунтувалась на хоча й латентному, але прихильному ставленні проросійського компартійного керівництва Чернівецької області до Російської Православної Церкви та його цілковитому несприйнятті національних Української Греко-Католицької Церкви та Української Автокефальної Православної Церкви. **Методологія дослідження.** Верифікація негативного сприймання компартійним керівництвом Чернівецьчини релігійного відродження національних церков відбувалася із дотриманням принципу історичної об'єктивності. Під час здійснення дослідження було застосовано методи критичного й структурного аналізу й класифікації, систематизації неопублікованих архівних джерел. Висновки базувались на документах трьох обласних архівів, а також сторінках комуністичних і національних періодичних видань та матеріалах інтерв'ю із учасниками подій. **Наукова новизна статті** полягає у тому, що вперше в українській історичній науці здійснено аналіз причин та наслідків двоякого сприйняття чернівецьким партапаратом релігійного становища регіону, внаслідок його підпорядкованості московському ЦК КПРС, що розглядав РПЦ як один із інструментів насадження російської ментальності в анексованих ним українських землях. Такий розгляд уможливило уведення до наукового обігу нової архівної документальної бази, яка раніше не була оприлюдненою для широкого кола наукових дослідників. **Висновки.** В історичній науці існує гіпотеза про вибірковість радянської, а відтак російської комуністичної доктрини “войовничого атеїзму” як цілковитого і безповоротного заперечення віри у Бога. Такі подвійні стандарти помітно виявляли себе у критичній для радянської влади часи, коли з метою власного виживання вона свідомо відступала від власних постулатів й пристосовувала їх до вимог часу. Останнім у “черзі” цих проявів був період, коли КПРС-КПУ вичерпала себе як ідеологічний стрижень держави та СРСР – як геополітичний об'єкт. Тоді за московською вказівкою місцевої чернівецький партапарат ілюстрував прихильне ставлення до РПЦ, субсидював пишне відзначення 1000-ліття хрещення Київської Русі-України у православно-російському форматі й здійснював непримиренне ставлення до УГКЦ і УАПЦ та протестантських церков, керуючись не релігійною, а політичною кон'юктурою.

**Ключові слова:** релігійне відродження, КПРС-КПУ, чернівецький партапарат, національно-демократичний рух, державність, Україна.

**The Problem Statement.** One of the regions of Ukraine, where at the end of the Soviet Union, the religious situation was marked by a number of features was Bukovyna, as the Ukrainian territory, which was almost the last one to experience the Soviet annexation at the end of World War II. This northern part of the Ukrainian historical region became the part of the UkrSSR and the USSR twice: on June 28, 1940 and on August 7, 1944. It was named Chernivtsi region with the administrative center in Chernivtsi and was the smallest in territorial production complex of the western region of the Republic (Ukrainian Soviet Socialist Republic. Encyclopedic reference book, 1986, p. 464).

In the second half of the 80s of the XXth century its area was 8,1 thousand square km., which was 1,6% of the national territory. Its administrative and territorial structure consisted of 11 districts, 10 cities (1 – republican subordination), 9 urban-type settlements and 207 villages (State Committee of the Ukrainian SSR for Statistics, 1989, p. 13). The largest districts were Storozhynetsky (1.2 thousand sq. km.), Vyzhnytsky (0.9 thousand sq. km.) and Putylskyi (0.8 thousand sq. km.) Districts. In Chernivtsi region 938 thousand people lived, which was 1,8% of the total population of the Ukrainian Soviet Socialist Republic. 42% of urban residents and 58% of rural residents lived there. Quite interestingly, the share of the former was 20% in 1939, and in 1979 – 38%. Such dynamics was not always due to the expedient Soviet industrialization of the region, which resulted in the urbanization of this long-standing agrarian region.

It is noteworthy that since 1960 the number of inhabitants of the region increased irregularly. In 1960 – 1970 the natural increase was 71,000, in 1970 – 1980 – 135,000, and in 1980 – 1990 – 48,000. Such decline was motivated by a certain “provincialism” of Chernivtsi region. This smallest region was located on the outskirts of the Republic and fell behind concerning the pace of socio-economic development against its general background. In addition to it, the mass emigration of a fairly large Jewish population of the region was added, which was partially allowed by the communist leadership of the country in the 70s of the XXth century due to a significant pressure on it by the international Jewish community and Helsinki Declaration of 1975. (State Committee of the Ukrainian SSR for Statistics, 1989, pp. 14–15).

About 85 nationalities lived in the region. Naturally, the largest in number was the autochthonous Ukrainian population, which numbered 667 thousand people, or 70,8% of the population of the region. However, over the past ten years, its number increased by only 0,6%. The second largest nationality was represented by the Romanians – 100 thousand inhabitants, or 10,7% of the local population. The number of the Moldovans was 85 thousand inhabitants, or 9%, the Russians – 63 thousand people, or 6,7%, the Jews – 16 thousand, or 1,8%, the Poles – 5 thousand, or 0,5%, the Belarusians – 2 thousand (Ministry of Statistics of Ukraine. Ivano-Frankivsk Regional Department of Statistics, 1991, p. 14).

The city of Chernivtsi as a regional administrative centre occupied an area of 20 square meters km. There lived 257 thousand citizens, the number of which over the past ten years increased by 37 thousand inhabitants. 157,000 workers and employees were involved in its economic complex. They worked at such key industrial enterprises as VO “Bukovyna”, “Trembita”, “Quartz”, “Voskhod”, “Cheremosh”, “Electronmash”, “Construction Materials”, F. Dzerzhynskyi Machine-Building Plant, “Metalist”, “Industry”, Yu. Fedkovych Factory. There were 74 production associations, 505 retail outlets and 411 catering establishments in the city. The share of urban industry in the total regional industrial volume was 74%, which indicated a significant concentration of factories and plants in the regional center. The leading place was occupied by the food industry – 32% of the total and light – 26%.

The educational network of the city included 2 higher educational institutions with 11 thousand students, 12 technical schools – 11 thousand, 16 vocational schools – 12 thousand, 47 schools – 35 thousand students. The social infrastructure of the city consisted of 57 libraries, 12 hotels, 5 museums and 2 theaters. families. Medical institutions were represented by 18 hospitals with 6,000 beds and 60 clinics. In 1980 there were 16 thousand people enlisted in the queue for housing, in 1985 – 18 thousand, in 1988 – 25 thousand (State Statistics Committee of the USSR. Ivano-Frankivsk Regional Department of Statistics. City Department of Statistics, 1991, pp. 3–80).

The entire economic complex of Chernivtsi was controlled by the Russian Communist Party of the Soviet Union (CPSU) and its Ukrainian unit, the Communist Party Of Ukraine (CPU). Chernivtsi regional party organization started its functioning on August 20, 1940 (Essays on the history of the Chernivtsi party organization, 1981, p. 38). Almost half a century later, in 1985 its number was 42 thousand party members in 1986 – 44 thousand, in 1987 – 45 thousand, in 1988 – 46 thousand, in 1989 – 45 thousand, in 1990 – 40 thousand in 1991 – 37 thousand communists. It comprised about 5% of the region's population. According to the national division, the Communist Party was divided into 69% of the Ukrainians, 15% of the Russians, 5% of the Romanians, 5% of the Moldovans, and 3% of the Jews. In terms of social composition, there were 36% of workers, 24% of peasants, 40% of employees. 34% of the CPSU members had higher education. They were united in 1,387 primary organizations, 960 guilds and 1,734 party groups. The administrative party structure was headed by 1 Regional Committee, 4 City Committees and 10 District Committees of the party (State Archives of Chernivtsi region – SACHR, f. 1, d. 5, c. 127, pp. 37–80).

The dominant status of Chernivtsi party nomenclature was due to its high financial level. The regional party budget amounted to 4 million karbovantsiv and consisted of 3 million karbovantsiv monthly party contributions, 300 thousand karbovantsiv revenues from party periodicals and 100 thousand karbovantsiv from other sources. If average Soviet citizen earned 100 to 200 karbovantsiv, the salary of the nomenklatura ranged from 300 to 600 karbovantsiv (SACHR, f. 1, d. 5, c. 322, p. 8).

**The purpose of the research** is to find out the features of the religious “renaissance” of Chernivtsi region of the Ukrainian SSR in the second half of the 80s – the beginning of the 90s of the XXth century and to identify the policy of the local communist party apparatus on religious issues during this period. It is known that the ideological core of the USSR was the communist doctrine adapted by the Bolsheviks, the social doctrine was invented by the dominant workers and peasants union, the national one was internationalism with a camouflaged Russian core, the economic one was unviable planned economy, and the religious one was militant atheism, as a complete denial of the faith of God in any of its formats. The synthesis of these components in symbiosis with the security forces ensured the total control of the Russian party apparatus over the country's polyethnic citizens – the residents of the neighbouring territories annexed by the Russians. It turned them into disenfranchised executors of the will of Moscow party nomenklatura, including at the level of religious affiliation.

However, the communist doctrine rejected the Christian doctrine, the party leaders supported the Russian Orthodox Church secretly because, in the Communist Party's vision, it was an expression of the spiritual unity of the Slavic peoples, and that suited Moscow government at critical stages of the Soviet rule. The activities of the always nationally oriented the Ukrainian Greek Catholic Church and the Ukrainian Autocephalous Orthodox Church were

banned. In different years, but with the same result, the clergy and parishioners, as well as the churches and property of the Ukrainian Greek Catholic Church (UGCCCh) and the Ukrainian Autocephalous Orthodox Church (UAOCh), were subordinated to the Russian Orthodox Church (ROCh). Therefore, Bukovyna was considered the Russian-Orthodox, which naturally led to contradictions among believers of the Christian denominations, especially in the region where they clashed territorially against the background of a complex historical past.

**The Analysis of Recent Researches and Publications.** Due to the fact that this issue was not yet the subject of sufficient scientific analysis, previous historical research works mostly concerned the political, socio-economic and religious development of Bukovyna in the XIXth – the first half of the XXth century. Numerous eminent Bukovynian historians worked in this sphere such as: A. Zhukovskiyi (Zhukovskiyi, 1991, p. 127), T. Bryndzan (Kvitkovskiyi, Bryndzan & Zhukovskiyi, 2021, p. 988), O. Dobrzhanskyi, V. Saryk, (Dobrzhanskyi & Saryk, 1998, p. 416), V. Botushanskyi, H. Chaika (Botushanskyi & Chaika, 2009, p. 384). However, in the scientific research works of the Ukrainian historians there was ignored such a crucial segment of the Bukovynian retrospective as the participation of the patriotic public in the anti-communist movement of the second half of the 80s – the beginning of the 90s of the XXth century. This issue caused the author's interest.

**The Results of the Research.** A selective attitude of the communists to the issue of religious freedom in the USSR was one of the reasons for the rapid and not always peaceful religious “renaissance” in Bukovyna at the end of the late 80s of the XXth century. By the way, Olha Kobyljanska's nephew, secretary of the regional council of the People's Movement of Ukraine (NRU), Doctor of Chemical Sciences, Professor O. Panchuk stated that one of the factors reviving the state-building trains of the Bukovynians was the atheistic doctrine of the ruling party, which allowed the existence of one religion selectively or denomination by banning the others (O. Ranchuk's interview recorded in 2010 (author's personal archive).

It should be mentioned that the introduction of the foundations of the Russian Orthodox Church in Bukovyna after 1944 gave a green light for the long-term domination of the Romanian Orthodox Church in Bukovyna region as well as the remote location of the Greek Catholic or Autocephalous centers. Hence, during the Soviet power, the region was mostly the Orthodox, which suited both the Union and local party apparatus. The ROCh's loyalty to the CPSU, despite the number of communist crimes against the Orthodoxy in the past, was explained by the common Russian roots of both Moscow-based groups with the centre in Moscow. When it came to the subjugation of the occupied territories, the mass communist persecution of the Orthodox hierarchs and parishioners was quickly forgotten, and mistrust grew into parity. After the majority of the Greek Catholic and Autocephalous clergy of Bukovyna were under repression in 1944 or were forced to emigrate from the region, a wide field of activity opened up for the ROCh.

Furthermore, taking into account a diverse ethnic composition and difficult historical past, the peculiarity of the Bukovynian religious situation was marked by a prominent Protestant content and the presence of the Judaism. Despite the Soviet bans, there were numerous communities, for example, of the Jews, the Adventists, the Evangelicals, the Pentecostals, the Baptists, and the Jehovah's Witnesses. But their environment was deprived of the Ukrainian national-state manifestations, and, thus, did not pose a threat to the communist system in the Union of Soviet Socialist Republics and the Ukrainian SSR. What could not be said about the former believers of the UGCCCh and the UAOCh, who always preserved in the people's memory the armed liberation past of the Ukrainian people. Hence, the UGCCCh and the

UAOCh activities, which were in officially forbidden, i. e., in a “catacomb” state, provoked increased opposition from the local party apparatus.

As it was impossible to ignore the 1000th anniversary of the baptism of Rus', which the UN General Assembly called to celebrate as the greatest event in the world history and culture, the Central Committee of the CPSU, led by Mikhail Gorbachev, decided to forget temporarily about atheism and to present its own favourable attitude to believers as an indisputable achievement of “perestroika”, “publicity” and “democracy”. As a result, the monastery of the Holy Kniaz (Prince) Danylo was transferred to Moscow Patriarchate, three theological conferences were organized with the participation of renowned scholars and it was allowed to convene Pomisnyi (Local Council), which from the XVIIth century was not related to the election of the patriarch. The premises of the world-famous Bolshoi Theatre were provided for the celebration, which was visited by the Secretary-General's wife, R. Gorbachova.

Quite naturally, such actions of the Union authorities led to the activation of the parishioners and hierarchs of forbidden churches. On December 17, 1987, Secretary of the Central Committee of the CPSU Yu. Yelchenko emphasized the revival of the Greek Catholic communities activities towards the legalization of the church. Delivering a speech in front of the entire local party nomenklatura at the plenum of Chernivtsi Regional Committee, he said that in connection with the approaching celebration of the 1000th anniversary of the baptism of Rus', the Catholic clergy in collusion with nationalist groups in the West were trying to increase influence among the Soviet citizens (State Archives of Transcarpathian region – SATR, f. 1, d. 30, c. 66, p. 11). L. Kravchuk, the head of the propaganda and agitation department of the Central Committee of the Communist Party, drew attention of the local party apparatus to the consolidation of Protestant communities in Kyiv, Volyn, Donetsk, Zakarpattia, Rivne, and Chernivtsi regions. He stated that among the Pentecostal community members of Rivne, Ternopil, Lviv, Volyn, Chernivtsi regions there was a fervent desire to leave the country (SACHR f. 1, d. 60, c. 80, pp. 53–55).

M. Nivalov, the First Secretary of the Regional Committee aimed at opposing the intensification of the Catholic communities by the Communist Party of Chernivtsi region, and organized their actions in the following way: “We must stand firm that the revival of the Uniate Church is politically harmful and impossible for Western Ukraine” (State Archives of Lviv region – SALR, f. 3, d. 62, c. 430, p. 23). In the context of obstructing the legalization of the UGCC, the regional committee of the Communist Party obliged informants to record the number, social composition, degree of activity of believers and their leaders and to neutralize the distribution of religious literature. The media pledged to publish speeches by the Orthodox clergy condemning religious separatism. The party apparatus strongly recommended the widespread use of the anti-Catholic speeches by authoritative religious dignitaries of the ROCh, which were heard at the celebrations on the occasion of the 1000th anniversary of the baptism in Moscow, Kyiv and Lviv (SALR, f. 3, d. 62, c. 301, p. 50). In order to strengthen the control over the observance of the legislation on cults, it was suggested carrying out surveillance of objects that may pose a special danger: inactive churches, monasteries, chapels, etc. In a written form it was recommended to warn every Greek Catholic priest about criminal liability for violating current legislation (SALR, f. 3, d. 62, c. 301, p. 51).

The analysis of secret party documents indicated that in 1988 in the territory of Chernivtsi region the cases of missionary activity of Jehovah's Witnesses from Khmelnytsky, Ternopil and Lviv regions became more frequent. Therefore, on March 19 and 20, the ideological

activists of the village of Novosilky, Kitsman district, managed to neutralize Jehovah's Witnesses attempt to establish contacts with local believers (SACHR, f. 1, d. 60, c. 80, pp. 61–63). In August – July of 1988, mass gatherings of Evangelists and mass baptisms of their followers in the Prut River took place on Theater Square in Chernivtsi, which led to attempts to use force by the party apparatus (SACHR, f. 1, d. 60, c. 80, pp. 53–55). As a result, the region atheistic staff of 300 lecturers and 600 organizers (SACHR, f. 1, d. 60, c. 49, p. 46) was strengthened by the foundation of anti-religious clubs and 97 debates and the “Soviet Family Holidays” on the topic “Let’s Think Together” (SACHR, f. 1, d. 60, c. 48, p. 52). On pages of the periodicals, in the section “On Atheistic Topics”, 11 articles were published, which dealt with the problems of sectarianism. One of them was published in the Novoselitska newspaper “Leninskym Shliakhom”. The author tried to determine the reasons and called to prevent the replenishment of Evangelical Baptist Christians’ communities by the youth of the district (Leninskym shliakhom, 1988, p. 1).

However, this opposition of the party apparatus did not affect the ROCh. For example, when Bishop Anthony of Bukovyna asked the Commissioner for Religious Affairs, A. Prykhodniuk, on May 4, 1988, to initiate a programme to celebrate the Christian anniversary, his request was immediately granted. Furthermore, by levelling its own atheistic principles, Chernivtsi party apparatus made considerable efforts to help those whom it persecuted and advertised for decades as an ideological enemy. As a result of this understanding, the church hierarchs and their guests were served by 3 best hotels in Chernivtsi, 3 central restaurants, 10 comfortable buses, escorted by traffic police and the premises of Chernivtsi Drama Theater. The journalists of the Communist Party media forgot about the materialist and idealist contradictions, and covered the jubilee celebrations, bypassing former contradictions. Communal services of Chernivtsi and the region, directed by the party apparatus, cleared up the Orthodox churches, chapels and the city cemetery, leaving out the other churches (SACHR, f. 1, d. 60, c. 100, pp. 19–26).

Thus, the general democratic movement generated by “perestroika” naturally grew into a national one and brought with it a religious revival. Hence, the information from the ideological department of Chernivtsi Regional Committee dated March 10, 1989 reported that the fanatical Uniates under conditions of democracy and publicity received freedom of conscience as unregulated religious activity and as the right to reject any legal norms and disobey the Soviet laws (SACHR, f. 1, d. 60, c. 226, p. 2). On July 13, 1989, the ideological department of Chernivtsi Regional Committee distributed a secret KGB document entitled “On the Uniate Church”, warned the party about attempts by extremist emissaries from Lviv, Ternopil, Ivano-Frankivsk, and Zakarpattia oblasts with the support of Western and Vatican propaganda centers, to revive the activities of the UGCC both in Ukraine in general and in the region in particular.

The document pointed out that the Greek Catholicism was more of a political movement with a strong anti-Russian orientation. Attention was drawn to the actions of Cardinal M. Lyubachivsky, who tried to transform the Uniate Church into a banner of the struggle for independence of Ukraine. According to the authors, the subordination of the UGCC to the Vatican gave grounds to claim that independent Ukraine would fall into the orbit of the interests of the United States and Western Europe – hostile to foreign and domestic policies of the Soviet Union.

Despite such warnings, attempts to legalize the UGCC were supported by believers in Chernivtsi region and the clergy and monks, who did not recognize the decisions of Lviv

Church Council in 1946 or, being officially the Orthodox, secretly remained supporters of the Greek Catholicism. There were more than 30 such communities in Bukovyna. In particular, in Putylsky, Vyzhnytsky, Kitsmanskyy, Zastanivskyy districts, bordering on Ivano-Frankivsk and Ternopil regions. In this regard, the party leadership warned that the legalization of the UGCC was strictly unacceptable because it had a political colour, it consolidated nationalist, anti-Soviet, anti-Russian, pro-Western elements and struck at the loyal and peacekeeping positions of the ROCh. Hence, the Regional Committee obliged the local party apparatus not to allow the penetration of the Uniate sentiments in the region, especially through family ties with the residents of neighbouring regions and countries. It was planned to continue neutralizing attempts to hold secret Greek Catholic liturgies, to cease the activities of underground monasteries and churches, to prevent the sale of church paraphernalia, the Ukrainian national symbols, the distribution of literature and audio recordings from the Vatican, etc. (SACHR, f. 1, d. 60, c. 211, pp. 12–13).

However, according to the KGB, in January of 1989, when a 5,000-strong liturgy was held in Lviv on the occasion of the proclamation of the Ukrainian People's Republic, residents of more than 200 settlements in the western regions of the Ukrainian SSR were present, including 37 representatives from Chernivtsi region. In June, EBC Presbyter I. Danyliuk organized an unauthorized rally near Cheremosh Hotel in Chernivtsi, and in July, baptism on the Prut River, which was attended by more than 2,000 believers. At Chernivtsi State University, the 24-hour course "The Fundamentals of Scientific Atheism" was cancelled, and the Party Committee submitted a proposal to the administration to liquidate the department. In July sectarians from the village of Shyryvtsi, Khotyn district, held open meetings, appealing to the "Law on Freedom of Conscience" (SACHR, f. 1, d. 60, c. 226, pp. 2–6).

According to the Commissioner for Religious Affairs, the share of baptisms increased by 4.5% over the year, as did the wedding ceremony. 121 people became students of the Greek Catholic educational institutions, which is 54 more than it was the previous year (SACHR, f. 1, d. 60, c. 337, p. 81). In August – September of 1989, the hierarchs of the UGCC Danyliuk, Kosteniuk, Bazeliuk and Priska attended liturgies in Chernivtsi, the villages of Velyka Kachuriv in Storozhynets district, Komarovo and Moshanets in Kelmenetsky district, openly called for an increase in the number of parishioners, confrontation with local communist authorities and seizure of inactive Catholic churches (SACHR, f. 1, d. 210, c. 337, p. 20). On November 26, Chernivtsi Initiative Committee for Legalization of the UGCC, with the help of NRU activists, held a large-scale solemn liturgy near the Church of the Assumption on Rus'ka Street in Chernivtsi. There were raised 9 national flags (Bukovynskyy visnyk, 1989, p. 3).

There was the rise of the Ukrainian Autocephalous Orthodox Church in 1990, which was the feature of the religious situation in Bukovyna and, as a result, its opposition to the Russian Orthodoxy of Moscow Patriarchate. Moreover, the movement for the legalization of the Greek Catholic communities was also added, which intensified the interfaith confrontation. The newspaper of Taras Shevchenko Ukrainian Language Society "Chas" (Time) wrote in those days that the ROCh stood, stands and will stand on the platform of the CPSU because it stands for the Union of Soviet Socialist Republics (Kozmych, 1990, p. 3). Formally promoting atheism, the party leadership in Chernivtsi Oblast repeatedly accused the leaders of the Ukrainian National Democratic Movement of the anti-people sentiment because they supported patriotic religious communities of the UGCC and UAOC.

Thus, on September 14, 1990, Regional Committee members complained that the already difficult religious situation in the region was exacerbated by intensifications among the Greek

Catholic and autocephalous communities. According to them, with the support of the NRU and the URP, false slanders were spread towards the ROCh, which led to confrontation between believers of these Christian denominations (SACHR, f. 1, d. 60, c. 350, p. 60). And on July 21, clashes between believers of the Ukrainian Autocephalous Orthodox Church and the Russian Orthodox Church took place near the Cathedral in Chernivtsi, demanding that the church be handed over to Kyiv Patriarchate. Being a supporter of the Russian Orthodox Church, the party apparatus immediately accused the NRU of illegally assisting the UAOC, calling such actions anti-state. However, the NRU's statement of July 30, 1990, signed by the head of its Chernivtsi regional branch, O. Panchuk, indicated different. The Rukh resolution stated the following: "The People's Movement appeals to all Orthodox Bukovynians – both those who recognize the spiritual jurisdiction of Moscow Patriarch Oleksiy and those who submit to the jurisdiction of Kyiv Patriarch Mstyslav – to resolve all issues peacefully, in a Christian way, avoiding confrontation and hatred (O. Ranchuk's interview recorded in 2010 (author's personal archive)).

Interestingly, the columns of Taras Shevchenko Ukrainian Language Society newspaper emphasized that meals from the Kremlin's ROCh patriarch's distributor, official residence, private luxury dachas, personal state cars, and government awards were not like simple Christian loyalty. And the accusations of anti-Sovietism of UAOC priests were expressed in the fact that they, dying in the clutches of the Bolshevik executioners, did not shout "Long live Stalin! Long live Stalin!" (Kozmych, 1990, p. 2).

In 1991, the legalization of the UGCC and UAOC in Chernivtsi region merged with the state-building deployment, which was the only front in the struggle to restore Ukraine's state independence. The movement can be expressed in the words of the deputy of the Verkhovna Rada of Ukraine S. Volkovetsky, expressed on February 23, 1991 at a rally in Chernivtsi. He said the following: "We must not stop at any sacrifice in the fight against Moscow for Ukraine's independence" (SACHR f. 1, d. 60, c. 410, p. 39). In January – August of 1991, 137 national demonstrations led by the anti-communist parties in Bukovyna took place in the region. There were 96 crowded Greek Catholic and autocephalous liturgies. Along with legalized communities of the UGCC and the UAOC, more than 20 national parties and public associations of anti-communist nature operated in the region. These were the branches of the NRU, URP, DPU, TUM, SNUM, SUMB, the "Green Movement of Bukovyna", and etc. The number of active supporters of the latter reached more than 25 thousand people (SACHR f. 1, d. 60, c. 459, p. 31).

Owing to the support of the Catholic and autocephalous believers, on January 26, 1991, a large-scale rally in Chernivtsi, led by O. Panchuk, V. Klim, and V. Zhorin, opposed the union agreement. There was formed "Yednist'" (Unity), the coordination council of the democratic forces of Bukovyna. A day later, a meeting of the "Green Movement of Bukovyna" was held at the Philharmonic, where its leader L. Sanduliak warned that the counterrevolution raised its head in the region (SACHR, f. 1, d. 60, c. 451, pp. 8–10). Such kind of call was not unheard. During the first half of 1991, Chernivtsi region was "flooded" with massive anti-union actions of civil disobedience in Chernivtsi, Storozhynets, Kitsman, Khotyn, Kelmentsi, and Sokyriany, which were attended by more than 150,000 supporters (SACHR, f. 1, d. 60, c. 451, pp. 4–5).

It is noteworthy that on the national uplift's wave, on June 9, 1991 in Chernivtsi, the Eminescu Society of Moldovan-Romanian Culture held an anti-communist meeting under the slogan "For our National Rights". The leitmotif of the meeting was the call of the Popular Front of Moldova to create the Democratic Romanian Republic of Bukovyna with the right to withdraw from the USSR (SACHR, f. 1, d. 60, c. 411, p. 97). It caused the rejection of

the Ukrainian national democratic forces, the relations between which got worse in 1991. However, taking into consideration the small number of demands, these tendencies showed no signs of sharp Ukrainian-Romanian-Moldovan political confrontation, but rather had the anti-communist coloration and consolidated representatives of all national camps.

During the uprising of the SCNS on August 19, 1991 at Independence Square in Chernivtsi, the representatives of the NRU and URP, the SNUM and SUMB received a public blessing from the hierarchs of the UGCC and UAOC and launched an indefinite action with slogans “Shame on the Moscow Junta!” and “Will to a Man – Will to Ukraine!”. At about 6 p.m., “Zlahoda”, the union of Bukovyna’s national democratic forces, issued a statement condemning the putschists’ actions, saying that the new leaders of the State Committee for Emergency Situations threw out of the bath a democratic child born in agony (Kyiak, 1991, p. 1). Liturgies and prayers for Ukraine’s independence continued in the churches at that time.

Thus, on August 21 and 22, a rally was held near Chernivtsi City Hall under the slogan “Democracy was Saved by the Democrats, and the Communists were Sitting in Burdock!” and “Send the Junta behind Bars!” (Kobevko, 1991, p. 1). Similar actions took place from August 20 to 27 in Putyla, Storozhynets, Novoselytsia, Kitsman, Khotyn, Vyzhnytsia, Sokyryany and Hlyboka (Chernivtsi, 1991, p. 1). On August 28, yellow and blue flags were hoisted over Chernivtsi Regional and City Councils, and a monument to Lenin was dismantled, symbolizing the overthrow of the Communist Party and the liberation of the region from Moscow-inspired Russian Orthodox Church (Chas, 1991, p. 1).

The above-mentioned process culminated in a natural result on December 15, 2018, together with the proclamation of the Orthodox Church of Ukraine. It merged the UAOC, expressed no conflict with the UGCC, later on received the Tomos and became the canonical successor of Kyivan Metropolitanate, founded by Kniaz (Prince) of Kyivan Rus’-Ukraine Volodymyr the Great one thousand and thirty years ago.

**The Conclusions.** Hence, in the second half of the 1980s and at the beginning of the 1990s, against the background of the Bukovynian National Liberation Movement, the duality of the communist ideological doctrine known as the “militant atheism” was quite vivid. It consisted in a secret and sympathetic attitude of the Communist Party of the Soviet Union to the ROC during the critical period for it, since the centers of both were located in Moscow. It was manifested both during the celebration of the 1000th anniversary of the baptism of Rus’, and in the context of further religious revival of the region. As Chernivtsi Regional Committees forgot about their own atheistic attitude, and contributed to the magnificent celebration of the anniversary according to the Moscow scenario, the restoration of the Russian Orthodox churches, registration of communities, arrangement of cemeteries and chapels, etc.

The UGCC and the UAOC activities were banned because they expressed the liberating past of the Ukrainian people in the struggle against the Russian-Soviet rule. That is why, Chernivtsi party apparatus waged an uncompromising struggle against them, prevented legalization, refused to return churches and property, and sometimes even inspired opposition between the members of the Christian denominations. However, on the anti-communist movement’s wave for the restoration of Ukraine’s state independence, Chernivtsi party apparatus lost power, and, thus, the ability to support the ROC, the foundations of which were shaken significantly.

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## EVOLUTION MOODS OF DONETSK RESIDENTS ON THE TEMPORALLY OCCUPIED TERRITORY

**Abstract.** *The purpose of the research is to characterize the mood of Donetsk residents in 2015 – 2019 on the territory where the Ukrainian authorities are temporarily not exercising their powers on the basis of the source base and historiographical work. The research methodology is based on the principles of historicism, scientificity, author's community, systematics, comprehensiveness, critical analysis of sources, as well as the use of general scientific (analysis, synthesis, generalization) and interdisciplinary (political science, sociology) methods. The scientific novelty of the obtained results is determined by the fact that for the first time in domestic and foreign historiography the mood of Donetsk residents on the territory of the so-called “DPR” has been elucidated, their evolution towards pro-Russian sympathies has been traced and the reasons for the latter have been described. The analysis of tendencies in socio-economic, political and socio-cultural spheres has been further developed. The Conclusions.* The capture of certain areas of Donetsk by the Russian occupation forces led to their political, economic and socio-cultural alienation from Ukraine. In the temporarily occupied territories, the Kremlin has created a powerful propaganda machine and a comprehensive network of

socio-political organizations in order to reformat the mass consciousness of Donetsk residents. This propaganda led to an evolution of the latter's sentiments, which manifested itself in an increase in pro-Russian sentiments and self-identification, as the share of respondents who identified themselves as the Ukrainians or those who felt Ukrainian decreased. As for the fate of the "DPR", the majority sought its independent or autonomous status within Ukraine or Russia.

**Key words:** "DPR", armed aggression, moods, occupation, "republic", Russia, Ukraine.

## ЕВОЛЮЦІЯ НАСТРОЇВ ДОНЕЧЧАН НА ТИМЧАСОВО ОКУПОВАНІЙ ТЕРИТОРІЇ (2014 – 2021)

**Анотація. Мета дослідження** – на основі джерельної бази та історіографічного доробку охарактеризувати настрої донеччан на територіях, на яких українські органи державної влади тимчасово не здійснюють своїх повноважень. **Методологія дослідження** спирається на принципи історизму, науковості, авторської об'єктивності, системності, всебічності, критичного аналізу джерел, а також на використання загальнонаукових (аналіз, синтез, узагальнення) та міждисциплінарних (політологія, соціологія) методів. **Наукова новизна** одержаних результатів визначається тим, що вперше у вітчизняній і закордонній історіографії розкриті настрої донеччан на території так званої "ДНР", простежена їх еволюція у бік проросійських симпатій та охарактеризовані причини, що впливали на останнє. Набув подальшого розвитку аналіз тенденцій в соціально-економічних, політичних і соціокультурних сферах. **Висновки.** Захоплення окремих районів Донеччини російсько-окупаційними військами призвели до політичного, економічного й соціокультурного їх відторгнення від України. На тимчасово окупованих територіях Кремль створив потужну пропагандистську машину й всеохопливу мережу громадсько-політичних організацій з метою переформатування масової свідомості донеччан. Це призвело до еволюції настроїв останніх, що проявилось у збільшенні проросійських настроїв, самоідентифікації, тому що серед респондентів зменшилася частка тих, хто ідентифікував себе як українець або тих, хто відчував себе українцем. Щодо долі "ДНР", то більшість прагнули її незалежного або автономного статусу в складі України, або РФ.

**Ключові слова:** "ДНР", збройна агресія, настрої, окупація, "республіка", РФ, Україна.

**The Problem Statement.** On February 24, 2022, the Russian Federation expanded its military aggression against Ukraine by launching a full-scale war. The temporarily occupied territories were used as a springboard for war preparation. Deoccupation and reintegration of these territories will be a complex process that will require considerable period of time and different approaches. Repeatedly and publicly the Ukrainian authorities stated their desire to return not so much the territories as the people who remained there for various reasons. The latter have long been under the strong propaganda influence of Russia's special organizational and ideological apparatus, among which various quasi-state institutions of the "republic" occupy an important place. In addition, on January 28, 2021, during the international forum "Russian Donbas", a programme document was presented – the Doctrine of "Russian Donbass". It reflected the measures that were practiced and should only be deepened to further develop the state ideology of the "DPR", which is based on the idea of "Russian world". This idea influenced changes in the mass consciousness of Donetsk residents. Therefore, finding out residents' mood on the territory of the "republic" is an urgent task not only from a scientific point of view, but also from a practical one.

**The Analysis of Recent Researches and Publications.** The issue of Donetsk residents' mood who found themselves under occupation has not received a proper scientific focus. This issue was elucidated by Ihor Rushchenko, Kharkiv sociologist partially. He came to the conclusion that the so-called "Luhansk syndrome" is spreading in some districts of Donetsk and Luhansk regions (hereinafter – ORDLO). The author described it as "the mood of the

hostages, victims with a high level of mythologized consciousness” (Rushchenko, 2017). The project “Conflict in Donbas: Current Realities and Prospects for Regulation” reflected the changes that have taken place in the military, socio-economic, energy, ideological, environmental spheres in the “DPR” (Viina na Donbasi, 2019). In a series of articles, Denis Kazansky, a journalist from Donetsk region, elucidated the changes that took place in the social and economic spheres of quasi-state formation (Kazanskyi, 2015; Kazanskyi, 2019). The Russian Federation provoked a number of other armed conflicts – Transnistria, Chechnia, Abkhazia, South Ossetia. The Polish political scientist Marczyn Kosienkowski analyzed the transformations that took place in the state ideology, the purpose of which was to change the opinions of the occupied population, in particular in the Transnistrian Moldavian Republic (Kosienkowski, 2011). Alina Osetrova and Lisa Sivets analyzed the changes in the educational policy on teaching History in Transnistria and the Crimea (Osetrova & Syvets, 2014). Therefore, due to insufficient study of this issue, the authors try to analyze it.

**The purpose** of the research is to describe the mood evolution of Donetsk residents in the temporarily occupied territory controlled by the “DPR” before the beginning of a full-scale war between Russia and Ukraine.

**The Results of the Research.** As a result of the armed aggression of the Russian Federation, Donetsk region was divided into two parts. In the spring of 2014, the Kremlin leadership did not have a single vision of the region’s fate. However, the invasion of regular units and signing the Minsk agreements demonstrated the desire to use the occupied territory on the one hand – to prevent the final loss of political influence on Ukraine, and on the other – to prepare for a full-scale invasion. Therefore, official Moscow, having held “elections” on November 2, 2014, began to form a power vertical with a full control over all spheres of life in the “republic”. Taking into account the continuation of hostilities and their localization, an important task was the formation of a combat-ready military force to oppose the Armed Forces of Ukraine. Thus, on the basis of Donetsk Russian occupation grouping, Donetsk operational and tactical command was formed, which was subordinated to the General Staff of the RF Armed Forces. The number of these forces was estimated at about 15 thousand soldiers. They were based on local residents, whose motivation is not so much ideological as material. As the socio-economic situation steadily deteriorated, unemployment rose, wages arrears increased, and therefore the only way out of this predicament for men was to serve in the “army”. If the rank and file was replenished with local representatives, the officer positions, senior command and logistics were headed by regular units soldiers of the Russian Federation (Viina na Donbasi, 2019, pp. 10, 37). No less important achievement, for the complete subordination of the military forces of the “republic” to the Russian command, was the death of the majority of the field commanders who were at the origins of the armed conflict in 2014 (Kazarin, 2017).

The next step was restructuring of the economy. In 2015, the monetary system of the “republic” switched to the ruble, and the Ukrainian hryvnia was completely withdrawn from circulation. After the signing of the Decree of the President of Ukraine № 62 / 2017 “On the decision of the National Security and Defense Council of Ukraine of March 15, 2017 “On Urgent Additional Measures to Counteract Hybrid Threats to Ukraine’s National Security”” external management was introduced at 43 Ukrainian enterprises. Thus, they found themselves under the leadership of the Russian company “Vneshtorgoservis”, and their focus on the Ukrainian market was redirected to Russia (Syzov, 2017, p. 2). This company was headed by S. Kurchenko, a Ukrainian businessman who was a member of V. Yanukovych’s mafia “Family”.

The socio-economic situation, after a temporary stabilization and improvement during the years of 2015 – 2016, due to the hostilities cessation and the normalization of the tax base, deteriorated in the “republic” steadily. This deterioration resulted in the forced dismissal of workers, the closure of enterprises, and an increase in wage arrears. For example, the above-mentioned enterprise owed its miners 8 billion Russian rubles in 2019 (Kazanskyi, 2019).

A number of the Kremlin legislative initiatives deepened the “republic’s” integration with Russia. In particular, on February 18, 2017, Vladimir Putin signed Decree № 74 “On the recognition in the Russian Federation of documents and registration plates of vehicles issued to citizens of Ukraine and people without citizenship, who permanently reside in the territories of certain districts of Donetsk and Luhansk regions of Ukraine”. According to this Decree there were recognized the documents issued by the “DPR” (O pryznanii, 2017).

On April 24, 2019, V. Putin signed Decree “On the definition of humanitarian categories of people entitled to apply for citizenship of the Russian Federation in a simplified manner”. Thus, the procedure for obtaining the Russian citizenship was simplified for residents of uncontrolled territory, i.e., the so-called “passportization” took place. At first it was received by “civil clerics” and then by the holders of the “DNR passports”. The majority of people sought to obtain it because of the desire to claim the Russian social assistance, pensions, and benefits which that are higher than the Ukrainian or “republican” ones. However, holders of the Russian passports from ORDLO cannot receive the Russian social assistance, because they do not have the Russian residence permit (Katrychenko, 2019).

According to the Commissioner for Human Rights of the Verkhovna Rada of Ukraine L. Denisova, as of 2021, about 600 000 Ukrainian citizens of Donbas out of 2.2 million living there received the Russian passports. In addition, there were numerous cases of a forced receiving, in particular, at the enterprises of the “DPR”. This step of the Kremlin is not new and has been tested in Transnistria, Abkhazia, South Ossetia and the Crimea to legalize its aggressive intentions. Because, under the Russian law, official Moscow can use the army abroad to protect its “compatriots” (Rzheutska, 2021).

An important question is how much it cost Russia to support the armed conflict. In general, the “DNR” is a loss-making quasi-state and existed owing to subsidies from Russia. In 2020, the then Deputy Prime Minister for the Reintegration of the Temporarily Occupied Territories of Ukraine O. Reznikov said that the maintenance of ORDLO cost \$ 5 billion a year. About 1.3 billion of them were spent on the public sector. This illustrated the importance to the Kremlin to influence the minds of Donetsk residents (Mokan, 2020).

Decisive changes took place in the ideological sphere. As noted in one of the analytical reports of the Institute for Strategic Studies, official Moscow used the “DPR” “as a platform for the levelling of the national identity of the citizens of Ukraine, the promotion of ideas aimed at deepening the existing regional, cultural, historical, ideological “lines of division” in the Ukrainian society” (Analychna dopovid, 2017). In 2014, during the “Russian spring”, hostile propaganda was formed around “Novorossiya”. However, it was alien and was not understood by the local population. Therefore, the Soviet values became a priority, and the Donetsk-Kryvyi Rih Soviet Republic became a landmark. According to I. Strelkov (“Girkin”), who inspired the armed conflict in Donbas, the ideology of ORDLO was not the annexation of these territories to Russia, but the separation from Kyiv. In other words, the Kremlin began forming an artificial structure of a political regional quasi-state (Voina neyzbzhna?).

The quasi-state propaganda was carried out by a wide-ranging system – “institutions of state power”, among which is the “Ministry of Information of the DPR”, which formed the

information field, media, social networks, in particular, VKontakte, “Odnoklassniki”, Twitter, YouTube, Telegramme-channels, etc. (Aleksieieva, Bulyk & Hridina, 2020, pp. 145–146). Information resources played an important role. They were based on the TV channels “Oplot”, “Oplot 2”, “Novorossiia”, “Pervyi Respublikanskyi” and “Union”, which serve as repeaters for anti-Ukrainian messages. The main theses the information resources spread are: the Ukrainian government does not seek peace, it is run by “nationalists”, “fascists” and oligarchs, it is under external leadership, Russia – not a party to the conflict, but peace requires direct negotiations with the militants, and etc. (Syzov, 2020, pp. 2–3). However, the majority of residents did not trust them and watched the Russian channels mostly: “First Channel”, “REN TV”, “STS”, “Russia 1”, “Russia 24”, NTV and the others (Dumky ta nastroi, 2018).

To work with young people was the priority for changing the opinions of the Ukrainian population. Young people, as noted by D. Aleksyeyeva, M. Bulyk, I. Hridina, was “both an object and a subject of propaganda activities” for the Kremlin curators (Aleksieieva, Bulyk & Hridina, 2020, p. 147). “Cadet schools” were established at schools for teenagers in ORDLO. In addition to the latter, there is Zakharchenko cadet corps. At the age of 7, the minds of children are influenced systematically, as they study the fictional “history of the republic”, military affairs, as well as hatred for all Ukrainian is instilled in them (Mokan, 2020). “The Young Guard – Unarmy” is among the newly formed paramilitary organizations. Anyone between the ages of 8 and 35 can become a member of this paramilitary organization. Its purpose is the military and patriotic education of the younger generation.

There was also created a whole network of organizations for the systematic education of the younger generation on the Soviet model. For children aged 7 to 10 there operate “The Eaglets”, from 10 to 14 – “The Zakhariivtsi” and “The Young Republic”. The latter should be singled out, as it has more than 7 000 activists, 37 headquarters in all cities and districts of the “republic”, 338 primary centers in educational institutions (Aleksieieva, Bulyk & Hridina, 2020, p. 147). Regular ideological work is carried out during mass events, in educational institutions, military and patriotic summer camps. In the latter, children have military training in weapons acquisition and the basics of military tactics. As the representative of the Ombudsman of Ukraine noted, “they have set up a whole network of camps”, in which children are instilled “love for the” Russian world” and hatred for the Ukrainians, for Ukraine”. In total, about 141 000 children study at the “DNR”.

Thus, there is a total political, ideological and socio-cultural russification of the youth. At secondary schools curricula play an important role in russification. Curricula have undergone significant changes as they have been converted to Russian. There is no subject “History of Ukraine”, and instead it there are the subjects: “History of the native land<sup>2</sup> and “History of Russia”. Textbooks from the Russian Federation are used in the educational process mostly, but school libraries are also gradually replenished with books already published in the “DNR”. In particular, a new History textbook was prepared for students, which contains a separate section “The Latest History of Donbas 2014 – 2017”. It should also be taken into account that in the “republic” children are born who are already separated from Ukraine and grow up in a hostile environment. This fact makes them a “lost generation” (“Svoia” ystoryia, 2018).

The situation with the adult population is different. The Kremlin is trying to influence it in various ways. According to “the Eastern Human Rights Group”, the Kremlin “is not limited to propaganda, but also funds political projects actively”. Thus, the Kremlin created an extensive system of pseudo-political formations. Among them “the Donetsk Republic” occupies an important place. It has about 210 thousand members (Analytycheskyi otchet

“Ahenti “ruskoho myra” v okkupyrovannom Donbasse”, 2020, pp. 27, 47). During the last “elections” held on November 11, 2018, the “DNR” leader D. Pushylin received 60.85% of the votes, and remained the head of the “DPR”. In the “parliamentary elections”, its members received 72.5% of the votes, or 74 “parliamentary seats” (Lukashova, 2018). Another important political force, which received 26% of the votes and 25 “seats”, is “Svobodny Donbass”. In addition, in the latter there are about 110 000 activists (Analytycheskyi otchet “Ahenti “ruskoho myra” v okkupyrovannom Donbasse”, 2020, p. 30).

Unlike children, adults could leave, but they remained under occupation for various reasons – economic, domestic, social, and some for ideological reasons. Their consciousness is also under information influence, but it was formed under other conditions and it is not as easy to be influenced as the younger generation consciousness. That is why, even those who are the supporters of Ukraine remained behind that line, in the occupation. A vivid example is the story of Donetsk journalist S. Vasin, who stayed because he had to take care of his relatives. He called this category “people who stayed”. In his opinion, these are the ones “who, in spite of everything, remain here, in the occupation, with the Ukrainian views” (Vasin, 2016). I. Kononov, Luhansk sociologist suggested the term “Luhansk syndrome” to describe this situation, starting from the definition of “Stockholm syndrome”. But, in his opinion, it would be more correct to use “Donbas syndrome”, because Donetsk residents, and not only Luhansk residents, are under the same condition. By this definition he meant “the anomic reorientation of large masses of the region’s population towards the aggressor in order to find security”. This phenomenon is psychological and situational, and if it disappeared on the Ukrainian territory, then on the occupied territory, on the contrary, it is rapidly developing (Kononov, 2015). How much their moods and views changed the opinion polls make it possible to follow. A study conducted by the German Center for Eastern European and International Studies at Humboldt University of Berlin in 2016, sought to understand “whether the growing physical and political distance between the two parts of Donbas is reflected in the life of the local population, its identity and positions”.

Answering the question “How did your identification change during the period of 2013 – 2016?” on the occupied territories, there was the share of those who felt more “Russian” – 26.1% of respondents, those who felt more “Ukrainian” – 8.5%, “Ukrainian” and “Russian” – 20.4%, and there were 45% of those who did not change their identity as a result of the war. Continuing the analysis of self-identification, 54% of respondents said that in recent years they began to feel less Ukrainian citizens, 8%, on the contrary – more Ukrainian citizens, and 38% did not see any changes self-identification. Thus, under the influence of a powerful ideological processing, the mass consciousness of the Ukrainian population of ORDLO began to change. Compared to pre-war sentiments, they began to associate themselves less with the Ukrainians.

Views on the cause of the armed conflict in eastern Ukraine are important. 50.3% of respondents considered this conflict to be the result of Western intervention, 11.3% blamed Ukraine for initiating it, 9.2% blamed the Kremlin, and 30% considered the conflict as the reaction of Donetsk residents to the revolutionary government’s actions. The attitude to the Minsk process and the agreement is rather ambiguous, as the question “Do you agree to the Minsk agreement?” 45.5% of respondents disagreed, 23.7% – strongly agreed, 21.3% – more likely to agree. Only their geopolitical sentiments did not change due to the fact that 18.2% were not against Ukraine’s accession to the EU, and 81.8%, on the contrary, and 6.9% and 93.1%, respectively, were in favour of joining the NATO. The results illustrate

the reflection in the minds of the local population of the main theses about the origins of the Russian aggression, which have been spread by the Kremlin mouthpieces since 2014 (Sasse Gwendolyn, 2017). Geopolitical orientations have not changed, which have remained stable compared to previous years, as in 2013 in the East of Ukraine 18.4% supported accession to the European Union (Yakym shliakhom, 2013).

An important issue that sociologists were interested in was the attitude to the status of “DPR / LPR”. According to a survey conducted by the aforementioned German center, in 2016, 35% of respondents wanted a special autonomous status within Ukraine, 20.6% – to return to the controlled territory under the previous conditions, 33% – a special autonomous status within the Russian Federation, and 11.4% to become the part of Russia without autonomous status. In 2017, the indicators, respectively, were as follows: 31%, 23.5%, 27.2% and 18.3%. There is a tendency towards the desire of the inhabitants of the temporarily occupied territories to obtain autonomous status, either as the part of Ukraine or as the part of the Russian Federation. In this case, the figures are almost the same. This shows that over time, people increasingly perceive their “separateness” or “independence” and agree to enter or return only on an autonomous basis. However, it remains unclear what the respondents mean by “autonomy” – the expansion of socio-economic rights or political, ideological, socio-cultural rights.

These figures can be compared with another study commissioned by the Ministry of Information Policy of Ukraine. Thus, in 2016, 31% of respondents sought a special autonomous status within Ukraine, 3% – supported the economic blockade of uncontrolled territory, 6% – advocated the continuation of hostilities until the full return of the lost territory under the control of Ukraine, 47% – the granting of independence “DPR / LPR”, 13% did not know what to say. In 2017, respectively, the answers were as follows: 43%, 2%, 1%, 43%, 11% (Vikhrov, 2019). Other data only show slight differences with the previous ones in the issue of returning ORDLO to Ukraine. At the same time, indicators of their independence confirm the author’s theory of the spread of self-awareness as a separate “state body”, which is supported by almost half of respondents. Thus, a poll conducted by Donetsk Institute for Social Research and Political Analysis on March 26 – 29, 2014 among Donetsk residents there was support for the DNR only 4.7% of respondents (Большинство дончан не одобряют действия сепаратистов – опрос).

The most thorough study of the mood on the temporarily occupied territories was conducted in 2019 by New Image Marketing Group at the request of the Ukrainian Institute of the Future and the weekly “Dzerkalo Tyzhnya”. As noted, the data error can reach about 9%, which is a lot for opinion polls, and therefore its analysis by the authors is done without showing figures.

At first, let’s look at a set of answers related to self-identification and socio-economic issues. Almost half of the inhabitants of these territories still considered themselves citizens of Ukraine and the same number – citizens of unrecognized republics. However, due to changes in the Russian law and the availability of the Russian citizenship, the majority did not seek to obtain it. Almost no one expressed a desire to leave the “republic”, but if they left, the advantage were in favour of Russia. They were ready to leave for Ukraine only in the case of stable work, the opportunity to rent or purchase housing. In the case of leaving for neighboring Russia, the housing issue is not so acute, and the priority – stable income. This may indicate a reluctance to stay in Russia and the desire to stay there only on conditional earnings.

Among the advantages for leaving for Ukraine were the following: no war, recognition of the country, a legal force of documents, functioning of banking system, availability of prospects, no shortage of medicines, the opportunity to buy foreign medicines, high quality and tasty food, improving the infrastructure of settlements. Among the shortcomings there were high utility tariffs, inflated rents, unfair increases in pensions (among some categories of people pensions were raised significantly, the others – “pennies”), medical reform, expensive medical care.

Everyone complained about the difficult socio-economic situation in the “DPR”, which, compared to the previous period, changed in a negative direction and was associated with unemployment, difficulty of employment. But there are also positive changes noted by respondents – low utility tariffs compared to the controlled area. Regarding the improvement of their situation, the mood was pessimistic, because no one believed that the situation would change in the near future.

Another block of issues concerned the armed conflict. Almost all respondents considered the actions of the aggressor in the Crimea to be legitimate in order to protect the Russian-speaking citizens alienated by Ukraine. The vast majority did not consider it an interstate confrontation between Ukraine and Russia, but fully agreed that it was a “civil war”. The revolutionary leadership of Ukraine, the United States, activists from the Maidan, the EU, and the government led by Viktor Yanukovych were responsible for it. The latter was found guilty because he did not disperse the Maidan, as happened during the riots in Russia and Belarus, and thus, did not suppress the conflict in its infancy. In general, the main cause of the conflict was considered to be the geopolitical processes at that time.

Respondents also expressed their views on the goals of the parties to the conflict:

1) **Ukraine** seeks to return territories, but not people, because the latter do not see that Ukraine wants to improve living conditions; to launder money to get rich in the war; to receive additional grants from the West;

2) **Russia** wants to protect its own interests and territory to prevent the NATO troops on its borders; to create a “buffer zone” for confrontation with the United States; to distract attention from the occupation of the Crimea; to defend the interests of Donetsk residents from the nationalist Ukrainians. In addition, respondents said that “in 2014 they were full of hopes to join Russia, it was for this purpose that they participated in the referendum”, but their hopes did not come true;

3) **The West** aims at creating a buffer zone that will defend its interests in the confrontation with Russia; placing the NATO bases closer to Russia; capture of the latter and its resources; dismemberment of Ukraine and its neighbour;

4) the “DPR / LPR” want to gain their recognition and join Russia; to return to Ukraine on federal rights; to oppose the spread of “the Bandera ideology”; to protect the right to speak Russian.

Concerning the future of the “republics”, the vast majority of respondents sought to join the neighbouring state in any status. Returning to Ukraine is also an acceptable option for them, but only on federal terms. In order to resolve the conflict, Ukraine should take the following steps: to amend the Constitution of Ukraine (especially with regard to the administrative and territorial structure), to grant a special status with the ability to adopt their own laws, to give Russian the status of the state language, to abolish the “nationalist Bandera ideology” in the Ukrainian government.

Among the biggest fears of returning to Ukraine among respondents there were the following ones: physical violence, repression by the nationalist Ukrainians, deportation to

camps and prisons, the stigma of “enemy”, and confiscation of property. At the same time, everyone noted that the DNR / LNR alone was not capable of defeating the Ukrainian army (Dumky ta nastroi, 2018).

**The Conclusions.** The invasion of certain areas of Donetsk by the Russian occupation troops led to their political, economic and socio-cultural alienation from Ukraine. According to opinion polls, this alienation has affected the mood and thoughts of Donetsk residents. The analysis of the surveys showed that self-identification has changed, as the share of those who identified themselves as a Ukrainian or those who felt Ukrainian has decreased. As for the fate of the DNR, the majority seek its independence or autonomous status within Ukraine or Russia. The choice was influenced by the powerful propaganda, information and ideological processing of the mass consciousness of the Ukrainian population in ORDLO, the development of an extensive system of political and public organizations covering all age groups, socio-economic factors. This led to the deepening of differences with “all-Ukrainian tendencies” that were prevalent in the Ukrainian-controlled part of Donetsk.

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## THE ROLE OF EDUCATIONAL INSTITUTIONS IN CIVIC IDENTITY FORMATION IN MODERN UKRAINE

**Abstract. The Purpose of the Study.** *Based on the fact that civic identity remains one of the crucial motivators of a person's behaviour, its formation through educational institutions is an essential means of ensuring the state national security. Therefore, it seems complicated to determine the nature and factors of educational institutions' influence on the formation of civic identity in modern Ukraine.*  
**The Research Methodology.** *The study combines the use of variable scientific abstraction with modelling and analysis of hierarchies. Besides, critical discourse analysis and content analysis methods have been used and the orientation-value method, political and legal analysis.*

**The Scientific Novelty.** The main work directions of educational institutions of modern Ukraine in the formation of civic identity and the nature of the organization of patriotic education have been determined. The paper contains an assessment of educational institutions effectiveness in this area based on the civilizational approach. The influence of globalization processes and the Russian Federation of aggressive plans for Ukraine on the formation of civic identity in Ukraine have been elucidated. The impact of state policy on educational institutions efficiency and readiness to adapt to the “knowledge economy” requirements have been determined. The main threats to national security in the formation of civic identity by educational institutions have been outlined. **The Conclusions.** The prolonged absence of statehood has significantly affected the formation of civic identity by educational institutions in Ukraine. Another problem was the lack of a strategy for constructing the information space in the context of its protection from information wars in other countries’ interests. The number of respondents who mostly consider themselves citizens of modern Ukraine is not growing fast enough. When this is not a priority for the state, it is not surprising that there is a reduction in training courses on the history of Ukraine. Refusal of humanitarian disciplines in technical educational institutions cannot promote full-fledged patriotic education of youth. However, the priority of civic identity over other identities proved to be extremely important under the conditions of war and a large-scale growth of external labour migration. Success in the civic identity formation by educational institutions, as evidenced by the active civic position of the population of modern Ukraine during the Orange Revolution, the Revolution of Dignity and the war in Donbas, should not be a thing of the past. Educational institutions’ potential in this area is vital for ensuring the state national security, preserving its integrity.

**Key words:** education, identity, citizen, civil society, state.

## РОЛЬ ЗАКЛАДІВ ОСВІТИ У ФОРМУВАННІ ГРОМАДЯНСЬКОЇ ІДЕНТИЧНОСТІ В СУЧАСНІЙ УКРАЇНІ

**Анотація. Мета дослідження.** Виходячи з того, що громадянська ідентичність залишається одним із важливих мотиваторів поведінки особи, її формування через освітянські заклади виступає важливим засобом забезпечення національної безпеки держави. Тому важливим видається з’ясування характеру та чинників впливу освітянських закладів на формування громадянської ідентичності в сучасній Україні. **Методологія дослідження.** У статті поєднане використання варіативного наукового абстрагування із моделюванням й аналізом ієрархій. Крім того, використані методи критичного дискурс-аналізу та контент-аналізу, а також орієнтаційно-ціннісний метод і політико-правовий аналіз. **Наукова новизна.** Визначено основні напрями роботи освітянських закладів сучасної України у формуванні громадянської ідентичності та характер організації патріотичного виховання. У роботі міститься оцінка ефективності роботи закладів освіти у цьому напрямі, заснована на дотриманні цивілізаційного підходу. Показано вплив глобалізаційних процесів та реалізації Російською Федерацією агресивних планів щодо України на формування громадянської ідентичності в Україні. Визначено вплив державної політики у сфері освіти на ефективність роботи освітянських закладів та їх готовність адаптуватися до нових вимог “економіки знань”. Окреслені основні загрози національній безпеці у контексті формування закладами освіти громадянської ідентичності. **Висновки.** Тривала відсутність державності суттєво вплинула на формування освітянськими закладами України громадянської ідентичності. Проблемою також стала відсутність стратегії формування інформаційного простору у контексті його захисту від інформаційних воєн в інтересах інших країн. Зростання кількості респондентів, які переважно вважають себе громадянами сучасної України, відбувається не досить швидко. В умовах, коли для держави це не є пріоритетом, не дивно, що відбувається скорочення навчальних курсів з історії України. Відмова від гуманітарних дисциплін у технічних освітніх закладах не може сприяти повноцінному патріотичному вихованню молоді. Однак пріоритет громадянської ідентичності над іншими ідентичностями виявився надзвичайно важливим в умовах війни та масштабного зростання зовнішньої трудової міграції. Успіхи на шляху формування громадянської ідентичності освітянськими закладами, про що свідчила активна громадянська позиція населення сучасної України в роки Помаранчевої революції, Революції Гідності та війни на Донбасі, не повинні відійти у минуле. Потенціал закладів

*освіти у цій сфері важливий для забезпечення національної безпеки держави, збереження її цілісності.*

**Ключові слова:** *освіта, ідентичність, громадянин, громадянське суспільство, держава.*

**The Problem Statement.** On December 1, 1991, the vast majority of the Ukrainian citizens spoke in support of independence. However, ideas about further developing the country and state-building priorities determined the civic position were gradually formed. This process took place under the influence of understanding and rethinking the role and place of Ukraine in the world and European historical process, the fate of the Ukrainian lands during the world wars, during the years of the USSR. It became essential to realize the responsibility of citizens for the future of the country. The obstacle was regionalism, cultivated in some regions of the state with the support of influential domestic and foreign political forces. Another critical factor was the process of globalization, which was accompanied by an increase in external labour migration, a “brain drain”, and the imposition of specific values that are not always acceptable to nation-states.

Under such circumstances, the issue of civic identity for modern Ukraine becomes an essential means of preserving the state. Therefore, at the country’s top leadership initiative, educational institutions have been transformed into powerful means of influencing citizens’ self-identification. The relatively long period of formation and development of personality during secondary and higher education provided ample opportunities for patriotic education and state thinking, overcoming the identity crisis. That included blurred values and foreign policy orientations, raising society’s general aggression with an active search for “enemies” regional, ethnic and interfaith relations. Ukrainization in the younger generations’ upbringing was to be an influential factor in the consolidation of society. The state Ukrainian language in the educational process helped overcome the language dictates of the Ukrainian cities’ Russian-speaking atmosphere.

**The Analysis of Sources and Recent Research Papers.** In this study’s context, it is appropriate to highlight X. Yonggen, (Yonggen, 2001), C. Rice, J. Klein (Klein & Rice, 2012). They paid much attention to analyzing the impact of educational institutions’ nature on social stability in the context of national security. G. Beckett, G. Postiglione explored the provision of “social harmony” through the assimilative role of language policy (Beckett & Postiglione, 2012). The specifics of the transformation of education in the modern world were studied by J. West-Burnham and L. Chapman (West-Burnham, 2009; Chapman & West-Burnham, 2010), analyzing it through the prism of social justice. The analysis of the influence of education on the socialization of marginalized strata of society is presented in the study of M. Bertrand and K. C. Rodela (Bertrand & Rodela, 2018), H. Haste analyzed the process of “constructing citizens” in Western culture formation an appropriate narrative aimed at accepting democratic values (Haste, 2004). S. Kvit’s work deserves attention (Kvit, 2020), who analyzed the development of higher education in Ukraine during the years of independence, as well as the analysis of the policy of decommunization of Y. Shapoval, I. Vasylieva and I. Matviienko (Shapoval, Vasylieva, Matviienko, 2020), who singled out the measures needed to overcome Soviet identity and identification in the Ukrainian society. It is also important to note the work of O. Sytnyk (Sytnyk, 2017), which shows the dependence of the implementation of aggressive plans of the Russian Federation in relation to Ukraine on the attitude of the Ukrainian citizens to Russia and Russians. In this context, we note the analysis of the national consciousness of the Ukrainians in Donetsk region at the beginning

of the development of the Ukrainian independent state (Sytnyk & Sytnyk, 2020). In general, the authors of many scientific studies agree on the importance of forming a civic identity in educational institutions, as it is an important component of ensuring national stability.

**The Purpose of the Research.** Based on the fact that civic identity remains one of the essential motivators of a person's behaviour, its formation through educational institutions is a vital means of ensuring the state's national security. Therefore, it seems complicated to determine the nature and factors of educational institutions' influence on the formation of civic identity in modern Ukraine.

**The Results of the Research.** The modern concept of identity gives the most outstanding value to authenticity, confirming the significance of the inner essence, which cannot express itself. In this case, the priority is the inner self, not the outer self, although a person may often not know the true inner self, only feeling that he is forced to live his own life (Fukuizama, 2020, p. 36).

The collapse of the USSR and the restoration of the Ukrainian statehood have sharply raised civic identity in Ukraine. The severity of the problem was due to several important political, economic and social factors.

It was important for Ukraine to ensure the state unity and territorial integrity in the face of escalating confrontation with the Russian Federation. After the collapse of the Soviet Union in Russia, the vast majority of the population and the political elite considered Ukraine's independence a temporary phenomenon. In Russia, there is a widespread belief that it is enough to support the "right" forces in Ukraine, and it will enter into an alliance with Russia on the Belarusian model or split, which would allow "to unite with the brothers in the east and south of this country". Sharp contradictions also concerned Russia's final recognition of Ukraine's borders (Istoriya Rossii, 2009, p. 752).

There were significant obstacles in state formation and the formation of civic identity in Ukraine as well. The long existence of the Ukrainian society outside its state formation, repeated failures to restore statehood, which led to the physical destruction of many members of the national movement, famines and repressions, led to a significant reduction in responsibility for the fate of their country. And although the unification of most of Ukraine's ethnic lands took place under the communist regime, the Soviet-rooted habit of following instructions from the "centre" also did not contribute to its formation.

The Soviet system was based on society atomization with the destruction of the vast majority of elements independent of controlling power. Ukraine inherited from the USSR a model of relations between the state and society, in which there was a gap between state power and citizens' daily lives. Such mutual isolation was exacerbated by the annihilation of any manifestations of civil society designed to mediate between the legitimate government and the citizens.

The economic opportunities of the majority of citizens also did not contribute to the formation of self-confidence. However, in 1991, the prevailing belief in Ukraine was that the restoration of statehood with secession from unstable Russia, which had entered a period of acute internal conflict, would improve living standards. However, it was not possible to do it relatively quickly.

The idea of restoring the Ukrainian statehood was perceived in Ukraine as the establishment of democracy, joining the world community of nations (Sanchenko, 2008, p. 115). After the collapse of the USSR, free elections became a symbol of democratic development for some time. In line with Huntington's (Huntington, 1991, p. 9) views, the election was considered a sign of legitimacy. However, as it quickly turned out, organizing

the elections was of great importance and the nature of ordinary citizens' participation. Citizens' attitudes to elections have become an essential indicator of civic identity. One of the negative phenomena was the spread of absenteeism, based on disbelief in influencing the vote results. Therefore, educational institutions' necessary task was to form a civic identity based on citizens' responsibility for their future. An indispensable role in this process was played by the reformatting of the content and means of teaching.

In the first half of the 1990s, a large-scale revision of educational programs took place in the humanities and social sciences. The new national narrative was introduced into official discourse and history textbooks. The study of the history of Ukraine at schools and universities began to be given increasing importance due to the scale of its influence on the formation of worldviews essential for the construction of civic identity. The corresponding mood determined the emphasis on the introduction of the national narrative in society. Thus, at the beginning of 1996, for 72% of the surveyed students of universities in Ternopil, Kyiv and Poltava, the study of history contributed the most to patriotic education (Filipchuk, 1996, p. 2).

Coverage and analysis of events and phenomena of the past were based on the analysis of declassified archival documents and materials, which were first introduced into scientific circulation. The archival revolution, rather than the dictates of power structures, as it was during the USSR's existence, became the basis for eliminating "white spots", and the emergence of new approaches to the process's periodization system history became widespread. The "partisanship of science" and the definition of a strict methodological framework for scientific research are a thing of the past. Instead, integrating Ukrainian historiography into the European and world historiographical space was initiated, and against this background, interdisciplinary research became widespread. The integration of Ukrainian historiography into the world historiographical space took place along with the rethinking of the role and place of Ukraine in the historical process. One such rethinking result was forming a scheme of the Ukrainian lands' historical development based on political history. The history of state formations in the Ukrainian ethnic lands became the basis for the periodization of training courses in "History of Ukraine", "History of State and Law of Ukraine", "History of Ukrainian Culture", etc.

The Ukrainian lands historical development scheme appeared as follows: Trypillia culture – Kyiv state – Rus' (Kyiv Rus') – Galicia-Volyn state – Lithuanian-Polish era – Cossack era – Hetmanate – the period of national liberation struggles 1917 – 1921 – the USSR – independent Ukraine. The Cossack era was positioned as the "golden age" of the Ukrainian history, which initiated the creation of the Ukrainian nation and statehood based on the observance of basic democratic principles. An important feature of the Ukrainian statehood was the election of its top leadership. Gone are the claims of "Ukraine's age-old desire to unite with Russia". Instead, the Ukrainian-centric narrative of history asserted Kyiv's state-centred state long before state-based entities emerged in Moscow. Ancient state traditions were important justifications for the right to restore the Ukrainian statehood, and the nature of Kyiv's foreign relations had long shown integration into the European historical process. The ties of the Kyivan state with Byzantium, the spread of Christianity in the Kyivan lands as early as the ninth century, and Russia's recognition in Western Europe proved the unscientific claims about Ukraine exclusively "suburb" of Russia.

However, even among pedagogical teams, there was a lack of understanding of the process of "Ukrainianization of education". Some teachers showed contempt for ethnocultural revival (Kindratets, 2009, p. 51).

The formation of large financial and industrial groups in Ukraine also hindered introducing a national narrative in educational institutions. The concentration of real economic power in a relatively small group of people, combined with the growth of their influence in the political establishment, contradicted the declared course of building a social and legal state. Therefore, there was negativity towards the country's top leadership in the educational environment, combined with disbelief in their work effectiveness.

A large part of the teaching staff was not aware of the essence of events and phenomena that took place in Ukraine, sceptical of the prospect of building a powerful state. Involuntary confusion and scepticism were passed on to pupils and students. In such circumstances, it is not surprising that at the beginning of the 1990s, many young people lost faith in the possibility of changing the situation in the country for the better on their own. A significant number of young people lost confidence in the prospects of their participation in political activities due to frustration, primarily in the government's economic policy (Holovatyi, 1993, p. 132).

Awareness of such difficulties was reflected in the discussion in scientific circles of the definition of the content of "state" and "national" education. In the Ukrainian polyethnic society, this issue was critical, as the Ukrainian civil nation's formation depended on its solution. The emphasis on the "Ukrainian ethnic component" in the construction of civic identity has created not only the unity of the Russian community in Ukraine but also specific problems in determining worldviews and assessments of the historical past. Therefore, in Ukraine, as in many Eastern Europe countries, the way out was seen in Eurocentrism.

In Eastern Europe, the attractiveness of the prospect of joining the European Union became a fundamental factor for democratic change and the development of democratization (Aizekhen & Stokvell, 2017, p. 534). The existing problems in the EU and the foreseeable future difficulties that could arise in this union were secondary to the advantages in human development formed in the EU: the priority of law, free development of civil society while maintaining scientifically sound state management of economic processes. Growth of living standards and ensuring the highest possible national security and state-guaranteed freedom of entrepreneurial activity do not contradict legal norms. The formation of a course for integration into European and Euro-Atlantic structures in Ukraine took place in the conditions of growing pressure from the Russian Federation. Such pressure in the Ukrainian government circles was perceived primarily as a prospect of losing their influence in the state and the threat of organizing economic activity in their interests. Perhaps, that is why, in the educational sphere, the emphasis was placed on the assimilation by young people of world culture's achievements, focusing on the civilizational approach to humankind's development.

In Ukraine, the European vector in the course of educational institutions became noticeable at the beginning of the 1990s, based on the goals and objectives set out in the State National Program "Education" ("Ukraine of the XXIst century"). This document emphasized that the formation of worldview should take place based on ideas, views, beliefs, ideals, traditions, customs, and other socially significant achievements of not only domestic but also world spiritual culture. The primary purpose of education was to gain social experience for the younger generation, inherit the Ukrainian people's spiritual heritage, achieve a high culture of interethnic relations, and form youth regardless of the nationality of citizens' personality traits the Ukrainian state (Pro Derzhavnu, 1993). The priority was the individual's free development based on interethnic tolerance and the importance of universal values. And this direction of educational activity was preserved and allotted.

In Russia, on the other hand, the main problem was the “ideological and political division of society”, and its solution was seen in the “realization of a new Russian idea” that “organically combined universal goals with truly Russian ones” (Putin, 1999) in search of symbols of national civic identity.

During the period of the 1990s, necessary steps were taken to spread the Ukrainian language in educational institutions. Despite some progress in this field, appropriate textbooks and manuals to technical educational institutions remained a problem. In technical universities, the situation persisted when many teachers continued to teach the material mainly in Russian.

One of the reflections of this situation was the relatively large number of citizens who continued to communicate mainly in Russian. Thus, during the period of 1994 – 2002, from 31,9 to 39,1% of respondents preferred communication in families in Ukrainian, from 32,4 to 36% – in Russian. And from 26,8 to 36,5% of respondents spoke Ukrainian and Russian, depending on the circumstances (Vyshniak, 2007, p. 383). Studies of ethno-political scholars have registered a steady increase in the number of Ukrainians who considered Russian their mother tongue – during the period of 1959 – 1989, their number increased by 5,59%, and in 1989 – 2001 – by another 2,53% (Kotyhorenko, 2003, p. 21, 23). The number of those who used Russian in family communication increased to 37% in 2001, compared to 29% in 1992 (Maznytsia, 2002). The liquidation of the Department of Language Policy of the State Committee for National Migration in 2000 and the Department of Language Supervision in 2001 remained indicative. Policy in the Cabinet of Ministers of Ukraine and the Council for Language Policy under the President of Ukraine (Udovenko, 2005, p. 9). Thus, the Ukrainian language’s official use in educational institutions did not provide the desired effect for a long time. This was facilitated by some politicians’ position, heads of enterprises, institutions and organizations who demonstratively refused to speak Ukrainian.

In educational circles, especially teachers of technical specialties, doubts were expressed about the feasibility of maintaining for students large amounts of teaching the humanities and, above all, history. The motivation, in this case, was the reduction of teaching hours in specialized subjects. Some teachers did not think about the possible consequences of such an approach, disregarding patriotic education.

Gradually, the consumer attitude to education as a means of self-realization of citizens became widespread in Ukraine. The digitalization of education with the possibility of acquiring knowledge via the Internet by limiting or eliminating real communication with the teacher has become an obstacle to young people’s patriotic education. This was facilitated by the realities of the labour market in the context of globalization. The demand for specialists in a particular profession in the leading countries of the world, as a rule, did not presuppose the need to instil in them patriotic feelings for the country where they were invited to work. As a rule, it was enough for employers to be convinced of the employee’s potential loyalty to a particular company.

Education was increasingly a product of consumption, the quality of which was to be determined by supply and demand in the labour market. Ukraine’s integration into the European and world economic space strengthened the influence of globalization processes. The requirements and values of the world labour market increasingly began to compete with the tasks of state-building. Describing this situation, M. Friedman drew the line between “learning” and “education”, emphasizing that not every education is education, and not every education is education (Fridman & Fridman, 2017, p. 93). J. Stiglitz argued that state subsidies for education lead to its “excessive consumption” (Stihlits, 1998, p. 459). J. Stadwell

noted the role of the state in the implementation of long-term goals to accelerate learning to maximize the future incomes of citizens with a high level of education (Stadvell, 2017, p. 12). This approach, first of all, reflected the interests of the heads of large firms interested in sponsoring the training of highly qualified specialists by state bodies of different countries. The interest here was in the possibility of attracting such specialists to their enterprises due to better conditions of self-realization and a relatively high level of wages. However, for donor countries, this situation resulted in a large-scale “brain drain” with the acceleration of educational institutions’ orientation not on the needs and interests of domestic state-building but the demands of the world labour market.

State-building was important not only to achieve a high level of development of production technologies but also the formation of civic identity through a balanced approach to the ratio of teaching technical and humanities (Faria, Montesinos-Yufa, Morales & Navarro, 2016). Otherwise, educational institutions produced specialists who were unwilling to work in their state’s interests and became an appendage of large financial and industrial groups of world scale, which supplied relatively cheap labour.

In the reality of the XXIst century, there was a self-limitation of national-state sovereignty. Instead of fighting for their independence in the international arena, some states deliberately transferred it to the more influential subjects of the world political process (Ozhevan & Dubov, 2017, p. 158). Ukraine is no exception, having lost nuclear weapons under external pressure in exchange for illusory guarantees of territorial integrity from other states. This policy continuation preserved external dependence on energy supplies and the country’s gradual transformation into an exporter of cheap raw materials and labour.

Therefore, it is not surprising that at the turn of the XXIst century in Ukraine, a relatively small number of respondents who primarily felt like Ukraine citizens were alarmed. Among the Ukrainians, there was about half of them, and among the state’s Russian population – only about 30% (Lytvyn, 2009, p. 726).

However, one of the results of Ukrainian educational institutions’ activities can be called citizens who can participate in political activities. Given the gradual loss of the electorate’s trust in “old” politicians in the second half of the 1990s, the rotation in the echelons of power meant a gradual increase in the number of politicians not burdened by “the Soviet identity” (L. Nagornaya’s statement). The result of educational institutions work positions young people’s electoral activity in the XXIst century. In the 1998 elections to the Verkhovna Rada, about 60% of young people took part, as opposed to 25% in the 1994 elections. One of the results was the election of more than 10 deputies under the age of 30 and a relatively large number of deputies under the age of 35. More than 5,000 young candidates became deputies of local councils, almost twice the previous convocation’s elected bodies (Dovzhenko, 1998, p. 26).

At the beginning of the 2000s, there was awareness in Ukraine of the importance of building a civil society. Growing competition and the presence of military and political threats required universities to train qualified not only professionals but also active members of civil society, for whom the interests of state-building were a priority (Romanovska, 2010, p. 71).

In the state educational policy, this understanding is reflected in the large-scale standardization of educational activities. Higher education standard became the basis for licensing and accreditation of educational institutions and a criterion for evaluating their actions, regardless of ownership (Terepyshchyi, 2007; Terepyshchyi, 2008). The realities of building a “knowledge society” and the need to confront the growing scale of “brain drain” (including due to Ukraine entry into the so-called Bologna process) required more attention

to the formation of curricula and work programs in disciplines focused on patriotic feelings, self-esteem own civic position with the rejection of outright election fraud.

It can be argued that the awareness of the inadmissibility of large-scale election fraud (perceived as neglecting the position of citizens) and the beating of students (perceived by many as an encroachment on family values through “child abuse”) were the reasons for the Orange and Dignity Revolution on patriotic education in educational institutions of Ukraine. Civic identity in Ukraine proved incompatible with national supremacy or racial discrimination, or the imposition of the one-person rule on society (even despite the demand for a “strong hand” in power).

The relatively tolerant attitude to the position of opponents can also be called the property of the Ukrainian society. This view was supported by the absence of armed clashes due to differences in foreign or domestic policy and the peaceful nature of protests when citizens’ position did not coincide with the state’s top leadership. Examples include the organization of elections in 1994, the delicate nature of resistance during the Orange Revolution, and civic stance during the Dignity Revolution. Despite the deteriorating economic situation with the spread of COVID-19, protests in 2020 against quarantine in Ukraine were peaceful. They were not accompanied by riots in shopping malls, shops or the seizure of office buildings, unlike, for example, the situation in Italy.

For a long time, the Ukrainian state leaders, despite everything, avoided the use of force against protesters. The exception was the top leadership of the state headed by V. Yanukovich, conditioned and provoked by the Russian Federation leadership. But even this did not lead to the “split of Ukraine” along the Dnipro cultivated in Russia. That is why, the Russian Federation was forced to resort to an undeclared war against Ukraine to realize its foreign policy interests. But even under conditions of such action, one of the consequences of civic identity formation by educational institutions of Ukraine was the spread of the volunteer movement aimed at repelling external aggression. And the roots of the unexpected large-scale resistance of the Ukraine population should be sought precisely in the priority of civic identity, despite the differences of citizens in assessing politicians’ actions of the present or past or specific events or facts in the Ukrainian history.

In the context of this study, we note the role of the Ukrainian Institute of National Memory. Thus, on his initiative in 2016, the Revolution of Dignity and the annexation of the Crimea were included in external independent testing issues. In 2017, a new Law of Ukraine, “On Education”, was adopted (Zakon, 2017), which initiated the reform “New Ukrainian School” created by the Ministry of Education and Science. In terms of the content of humanities, including history, the Ministry of Education and Science in cooperation and the Ukrainian Institute of National Memory initiative in the 2016/2017 school year introduced a new history programme in grades 10–11 schools. The new program highlighted the theme “Ukrainian Revolution of 1917 – 1921”, the period of 1921 – 1939 was called “Establishment of the Soviet totalitarian regime”. Given the development of the Russian-Ukrainian war in the Donbas, the themes of the battle of Kruty and the war of Soviet Russia against the Ukrainian People’s Republic were also singled out and expanded. The Ukrainian people’s contribution to the victory over Nazism during World War II was described in detail, covering the Ukrainians’ participation in the United Nations’ military formations. The terms “Soviet occupation”, “deportation”, etc., as well as several figures and personalities of the Ukrainian liberation movement, were introduced into the history course (Yakymenko, 2018, p. 45).

The installation of memorial plaques to the Russian-Ukrainian war participants in the educational institutions they studied played a positive role in educating young people during

the period of 2014 – 2021. And it is essential that such an initiative came “from below”, which testified to the Ukrainian citizens’ attitude to Donbas confrontation. In such situation, educational groups often acted as organizers of the memorialization of fallen soldiers of the Armed Forces of Ukraine.

Even though some educators remained on the Russian-annexed Crimea territory or continued to work on the territory of the so-called “DPR” and “LPR” not recognized by the Verkhovna Rada of Ukraine, the vast majority of educators supported the struggle for Ukraine’s territorial integrity. A significant consequence of the Ukrainian society’s rejection of the concept of “Russian peace” was the failure of the “Novorossiia project”, which provided for the sacrifice of Ukraine’s eastern and southern regions.

The formation of a pro-European identity in Ukraine outweighed attempts to implement the Russian neo-imperial project. And the construction of civic identity in the Ukrainian educational institutions mustn’t be based on the restoration of “military greatness” or “revenge for past wrongs”. While the Russian President V. Putin openly regrets the collapse of the Soviet Union and seeks to restore superpower status, the Hungarian Prime Minister V. Orban speaks of a “return of self-esteem and the future”, and the Chinese government Xi Jinping speaks of “a hundred years of humiliation” and as the United States, Japan, and other countries try to prevent it from regaining its status as a great power (Fukuizama, 2020, p. 21), there is no emphasis in Ukraine on securing force or fighting through economic pressure for future prosperity. The priority is democratic values combined with the Ukrainian traditionalism, based on respect for the family, the native land with the importance of productive work for the better life of future generations.

Simultaneously, the growing pace of external labour migration, caused by growing economic problems in an armed confrontation with the Russian Federation, became a challenge to modern Ukrainian society. Its character had taken threatening forms since 2016 when a growing number of young people expressed a desire not only to find employment abroad temporarily but also to live permanently outside Ukraine. The ever increasing rate of external labour migration led to a shortage of workers in specific sectors of the economy. In 2018, the share of those who wanted to move to a permanent residence abroad increased to 54% (Reitynh, 2017).

Formed by the media’s active influence, citizens’ desire to “live with dignity here and now” contributed to the growth of young people seeking employment abroad. Although the vector of external labour migration changed significantly due to a sharp reduction in the number of migrant workers working in Russia, favouring an increase in the number of those who preferred to work in the EU, migration continues to be large and may threaten national security.

Unfortunately, the educational institutions activities field of counteracting external labour migration growth have been unsuccessful. Educators failed to form in young people a strong belief in the prospects of employment in modern Ukraine. Therefore, at the micro-social level, there is a situation where personal ties between citizens, who are responsible for making economic and political decisions, proved to be more important than official ones. And more than a third of respondents said in 2018 that they could not live under new social conditions (Vorona & Shulha, 2018, p. 467). This statement resulted from insufficient vocational guidance in educational institutions and a certain detachment of theoretical training from practical skills.

In the recent five years, there has been a reduction in hours of History of Ukraine, the refusal of technical departments to teach History to students, the liquidation of political science

departments and the decline of the total number of humanitarian workers in the unification of educational institutions. So the actions took place in general in line with ministerial decisions. Thus, by order of the Ministry of Education and Science of Ukraine of October 15, 2020, “On Approval of Conditions for Admission to Higher Education in 2021”, independent external testing in the Ukrainian language and literature was made mandatory for admission to 44 specialities, mainly humanitarian profile. The test only in the Ukrainian language was required for access to 91 specialities out of 135, and in History of Ukraine, only to 17 mainly humanitarian specialities and the specialities “Law Enforcement”, “Social Work”, and etc. Testing in Mathematics remained a priority, as the external examination results were required as the second compulsory subject for admission to 81 specialities, 82 – in 2018, 87 – in 2019 and 69 – in 2020. Successful passing of such test was recognized as mandatory for all specialities of the fields of knowledge “Transport”, “Health Care”, “Information Technology”, “Production and Technology”, “Architecture”, etc. On October 22, 2020, the Acting Minister of Education and Science S. Scarlett noted that the decision on the possibility to choose which external examination should be made – the Ukrainian language and literature or only the Ukrainian language – was made by Minister L. Hrynevych in 2019 and this is what led to the implementation of this rule in 2021.

Taking into consideration such actions, it is not surprising that the number of citizens who associate themselves with Ukraine citizens is relatively slow. Thus, if in 1992, 45,6% of respondents considered themselves mostly Ukraine citizens in 2018 – 58,6%. And even during the war, there was a reduction in the proportion of such respondents from 60% in 2016 to 58,6% in 2018. Simultaneously, the number of those who considered themselves primarily citizens of the former Soviet Union decreased from 12,7% in 1992 to 3,1% in 2018. During this period, the number of those who considered themselves primarily citizens of the world decreased from 6,4, up to 3,3% (Vorona & Shulha, 2018, p. 464).

The formation of civil liability for the election results remained a problem. Thus, in 2018, 53,2% of respondents did not feel any responsibility for who is the President of Ukraine, and 52,7% – for who is the People’s Deputies (Vorona & Shulha, 2018, p. 466). And this situation remains quite threatening in the face of continued war and powerful information attacks aimed at undermining faith in the subjectivity of the Ukrainian state and the right and ability of the Ukrainian people to decide their future.

**The Conclusions.** The formation of civic identity by educational institutions of modern Ukraine was significantly influenced by the long absence of statehood and a full-fledged civil society, paternalism formed during the years of the USSR combined with the alienation between the government and citizens, as well as crisis phenomena in economic development. The separation of voters from the illegal actions of the elected representatives of the authorities, rooted in the Soviet practices of interaction between the leaders and the citizens, has been preserved in post-Soviet Ukraine as well.

A particular state strategy played a negative role in forming a civic identity for creating a national information space of the Russian and Western products dominated for a long time, creating an appropriate atmosphere in society and identity far from the Ukrainian national interests.

The reduction in the volume of training courses in the history of Ukraine and the liquidation of training courses in political science had a negative impact on the formation of civic identity by educational institutions. The emphasis on studying the exact sciences in globalization with a significant reduction in attention to the humanities may be why Ukraine, spending its funds, will train specialists for other countries. In this context, the digitalization

of education with the introduction of distance learning significantly reduces its educational potential and may, in the future, pose a threat to national security.

Educational institutions do not sufficiently develop skills for long-term social adaptation. The priority remains basic knowledge rather than the ability to implement them in practice and the formation of social stability and relative invulnerability to stressful situations. Educational institutions have failed to form an idea of the priority of highly professional work over personal connections and the belief that promising self-realization is possible, mainly in Ukraine. At the same time, the formation of a stable readiness of citizens to defend their homeland, family, place of residence from hostile encroachments, as well as ideas about the ancient traditions of the Ukrainian statehood and belief in the right of the Ukrainian people to decide their destiny can be considered a success.

The priority of civic identity over religious beliefs or ethnic customs in determining the population's attitude to encroachments on the state territorial integrity is the key to organizing a successful repulse of the aggressor. The formation of civic identity in educational institutions should be a priority regardless of their form of ownership, activity profile, or education organization. The importance of acquiring special knowledge necessary for professional activity before forming an active civil position may create a situation where citizens' priority will be external labour migration, regional and narrow corporate interests.

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## VISUAL CONSTRUCT IN MUSEUM PRACTICES

**Abstract.** *Based on modern visual discourse, in the article there has been analyzed the visual construct as the main form of museum visualization, museum practice and visual technologies in the Ukrainian museology, and attention has been paid to the museum modelling peculiarities and vital tasks of the visual construction interpretation, sociocultural possibilities of visual construct and its influence on the visitor have been outlined. The researched visual construct is a separate museum object/museum complex (fragment of a museum exposition), modelled owing to museum practices in order to visualize particular meanings in the museum space. **The purpose of the research** is to highlight the specifics of visibility in museology, which is due to the development of modern interdisciplinary direction of visual studios (visual studio), in the context of which modelling museum space through a visual construct acquires new features and deepens its understanding significantly. **The methodology of the research** is based on the interdisciplinary, hermeneutic, culturological, semantic, semiotic, social and psychoanalytic scientific approaches, which allowed carrying out a comprehensive analysis of museum visibility, gave the opportunity to form a set of principles in order to study the visual construct as the basis of museum*

practices, to delve into the spiritual phenomena of a human being. Along with general scientific methods of analysis, synthesis, comparative studies and explanation, the following methods have been used: methods of observation, modelling and interpretation, which contributed to the study of decoding the visual information and constructing new meanings, features of verbal reflection through the visual construct of spiritual models of mentality, consciousness and ideas. **The scientific novelty:** owing to the culturological concept of the synergy of visuality and museology the relevant meanings have been presented. For the first time, the segment of visual culture has been singled out – the museum visuality, its key element has been analyzed – the visual construct as a simulated system of visually reflected meanings for perception in the museum space. **The Conclusions.** Theoretical principles and interdisciplinary nature of visual studies expanded the scientific and practical possibilities of museology significantly. Visual technologies, applied in museum practices stimulated a new look at the visual construct, which was transformed into a prominent segment of visual culture with its own specifics of figurative representation, interpretation of symbols and emotional and mental reception of a human being.

**Key words:** visual culture, museum visuality, visual construct, visual technologies, museum practices, interpretation.

## ВІЗУАЛЬНИЙ КОНСТРУКТ У МУЗЕЙНИХ ПРАКТИКАХ

**Анотація.** У статті на основі сучасного візуального дискурсу розглядається візуальний конструкт як головна форма музейної візуалізації, проаналізовано музейні практики й візуальні технології в українському музейництві, приділено увагу особливостям музейного моделювання та важливим завданням інтерпретації візуальних конструкцій, окреслено соціокультурні можливості візуального конструкту, його вплив на відвідувача. Досліджуваний візуальний конструкт – це окремий музейний предмет / музейний комплекс (фрагмент музейної експозиції), змодельований через музейні практики для візуалізації певних смислів у музейному просторі. **Мета дослідження** – з'ясування специфіки візуальності в музейництві та зумовлена розвитком сучасного міждисциплінарного напрямку візуальних студій (visual studio), у контексті яких моделювання музейного простору через візуальний конструкт набуває нових ознак і значно поглиблює його осмислення. **Методологію дослідження** склали міждисциплінарний, герменевтичний, культурологічний, семантичний, семіотичний, соціальний та психоаналітичний наукові підходи, які дали можливість здійснити комплексну аналітику музейної візуальності, сформувані сукупність принципів для дослідження візуального конструкту як основи музейних практик, заглибитися в духовні феномени людини. Одночасно із загальнонауковими методами аналізу, синтезу, компаративістики, пояснення застосовувалися методи спостереження, моделювання, інтерпретації, які сприяли вивченню процесу декодування візуальної інформації та конструювання нових смислів, особливостей вербального відображення через візуальний конструкт духовних моделей ментальності, свідомості й ідей людини. **Наукова новизна** полягає у представленні актуальних смислів через культурологічну концепцію синергії візуальності та музейництва. Вперше, виокремлюючи з візуальної культури сегмент – музейну візуальність, розглядається її ключовий елемент – візуальний конструкт як змодельована система візуально відображених сенсів для сприйняття у музейному просторі. **Висновки.** Теоретичні засади та міждисциплінарний характер візуальних студій значно розширили науково-практичні можливості музейництва. Візуальні технології, застосовані в музейних практиках, змусили по-новому подивитися на візуальний конструкт, який трансформувався у помітний сегмент візуальної культури з власною специфікою образної репрезентації, інтерпретацією символів та емоційно-ментальним сприйняттям його людиною.

**Ключові слова:** візуальна культура, музейна візуальність, візуальний конструкт, візуальні технології, музейні практики, інтерпретація.

**The Problem Statement.** Modern transformational processes, which take place in science and a rapid development of information society form up the latest research paradigms. There have been noticeable changes in visual studios since the second half of the XXth century in the interdisciplinary field of socio-humanities. The “pictorial turn” in science led to a

rethinking of the place and meaning of visual senses, and the study of visuality covers more and more areas of scientific knowledge and practice gradually.

Museology formed its own specifics of the visual space, which combines the historical documentation and figurative extrapolation organically, and the museum practitioners develop innovative technologies for modelling the visual construct. Conceptually, the museum visuality, which is based on a visual construct of documents, photographs, audio, video recordings, objects, as the part of visual culture, is aimed at the synergy of cognitive and sensory. The museum construct, with the help of the museum practices, while reproducing images of renowned figures, the atmosphere of a certain historical epoch, intellectual or an everyday life of different social groups, first of all, is supposed to interest the visitor visually and evoke emotions at the level of sensory perception.

**The Analysis of Recent Researches.** The historiographical base of visual studies consists of works written by foreign and Ukrainian scholars. The visual discourse was covered by foreign studies of M. Sturken (Sturken, 2001), B. Sandywell (Sandywell, 2011), D. Levin (Levin, 1999), M. Yampolsky (Yampolskiy, 2007), A. Usmanova (Usmanova, 2017), in which the focus was on theoretical issues of visuality formation, visual rotation, visual culture, interaction of an object and observer with the help of the visual technologies. French existentialist-writer J.-P. Sartre (Sartre, 2000) raised the issue concerning a human being's attitude to things, the visual anthropology features were highlighted by a researcher S. Pink (Pink, 2006). L. de Caro put emphasis on the bodily and sensory influences on a visitor used in museum practices through interactive technologies, immersion and dynamic architectural forms (DeCaro, 2015) and M. Shehade, T. Stylianou-Lambert emphasized the same things (Shehade & Stylianou-Lambert, 2020). In particular, L. de Caro stated that due to the holistic connection of visual, interactive in the perception of the museum object, museum visits enriched the visitor with a truly multi-sensory experience (DeCaro, 2015).

Art critic A. Boylen depicted technologies and strategies of the visual, as well as the interaction of the visual with a human being in her book "Visual Culture" (Boilen, 2021). M. Bal', Director of the Amsterdam Institute for Cultural Studies, considered the visual image, with its hidden meanings, as a separate semiotic system (Bal, 2012). I. Malkovskaya focused on a human self-preservation issue in the visual and virtual space (Malkovskaya, 2008).

Among the Ukrainian researchers, the following scholars could be mentioned O. Kovalevska (Kovalevska, 2016; Kovalevska, 2018), H. Ilyina (Ilyina, 2018), who analyzed the visual studios genesis, development and main problems. Doctors of Philosophy (PhD) O. Malanchuk-Rybak (Malanchuk-Rybak, 2013), L. Verbytska (Verbytska, 2016) and scholars V. Kremen, V. Ilyin (Kremen & Ilyin, 2020) focused on visual culture, culture of thinking, visual perception of image, its deconstruction of meanings, the ratio of verbal and visual.

The museum segment emerged in the field of visual research gradually. The museum workers, involving theoretical and practical developments of visual studios actively, conducted professional discussions at scientific meetings. In particular, museum workers of Cherkasy Regional Museum of Local Lore, Cherkasy Regional Art Museum joined the all-Ukrainian scientific conferences "Visuality in Ukrainian Culture: Status, Dynamics, Contexts" (Lychkovakh, 2013), "Museum as Visual Text of Culture" (Lychkovakh, 2017), at which the innovative approaches to museum visuals were discussed. Museum visuality has become recently the subject of dissertations recently. In their research works applicants for the degree of Doctor of Arts I. Yakovets (Yakovets, 2018) and Candidates of Culturology H. Novikova (Novikova, 2019) covered visual practices in the museum space. In spite of the fact that

visual studios are widely represented in modern scientific discourse, but the peculiarities of the synergy of museum space and visibility, museum visibility, visual construct have not been the subject of scientific research. Hence, **the purpose of the research** is the drastic need to consider the features of the visual construct as a vital element of the museum visibility, modelled owing to museum practices in the context of visual studios.

**The Results of the Research.** It is important to single out specifics of the visual construct formation, interpretation and perception, while considering the visual construct in the context of the visual research, within which the visual construct is a separate museum object/museum complex (fragment of a museum exposition), modelled owing to museum practices to visualize certain meanings in the museum space. The basis of the visual construct is a museum object, the general characteristics of which are authenticity, credibility, clarity, syncretism, informativeness, emotionality, axiology aspects (Mankovska, 2016, p. 41). It should be stated that one more feature of the museum object is also the “legend of the exponat” – the history and circumstances of entering the museum collection. In general, the museum practice keeps to the following course of action: the exponat, in order to become a museum object, on the way to the museum collection undergoes a special selection procedure, which takes into account its historical value, uniqueness and state of preservation. The assessment of the museum visibility of the exponat includes its content, features and exposition possibilities for the reconstruction of events and facts. It should be mentioned that museum practices provide a special technique for the museum funds formation. The fund commission of the institution, which consists of the representatives of all departments of the museum, is responsible for the selection of exponats to the museum collection. The specialists evaluate, analyze, juxtapose all the characteristics of the exponat, which allows ensuring objectivity in the selection of objects that will undergo the museification procedure and, once in the museum exhibition, will receive the signs of visual constructs.

It is absolutely essential for the exhibitor to present the relic and visualize the embedded but hidden information in it, to model a new reality, to excite the visitor. The museum exposition, which with the help of the visual constructs reproduces the historical past, modern realities, spiritual phenomena, forms a peculiar segment of the visual culture. In the process of creating an exhibition, it is crucial for the museum workers to keep in mind that a modern visitor, who enters the world of museum visibility, must decode the meanings of seen museum constructs and, according to researcher Ye. Batayeva, penetrate/dive “into their visual flesh” (Batayeva, 2013, p. 50). The museum practices of exposition are of utmost importance in this situation, as they allow ensuring the objectivity of the historical reconstructions. According to A. Usmanova, a researcher, the visual composition in the museum includes ontological (origin and implementation of the concept), epistemological (knowledge of historical reality) and sociological (socio-cultural impact on society) aspects of information (Usmanova, 2013).

The visual construct, reconstructing historical reality, has a significant potential to document the course of events and facts of public life and its individual representatives. Undoubtedly, not only the variety of unique museum rarities but also museum practices that combine the research experience of museum exhibitors and a creative approach of artists and designers are especially valuable in forming a reliable image of the historical epoch or worldview of a human being, or museum visibility in general. The museum construct is supposed not only to model a certain historical fact but also to have influence on the emotional feelings of the visitor, instigating the visitor to intellectual pondering over and reflections.

As it was mentioned above, entering the museum environment, the visitor is immersed in the visual space of the museum. This method in museology is called submersible (immersion method). The museum practices apply such types of the visual constructs modelling as transposition with fixation of all details and relationships and stylization with modelling of phenomena without authentic museum exhibits (Novikova, 2019, p. 23). The renowned museum worker from Russia T. Poliakov, among the promising methods of museum practices for the exhibitions creation, highlighted the image-plot method and art-mythological method (Polyakov, 2003, c. 22), which could enhance the visitor's sensory perception.

In National Museum of the History of Ukraine in World War II, the eminent in Ukraine and abroad People's Artist of Ukraine Anatoliy Haidamaka depicted the symbolic "Doroha Viyny" ("Road of War") with the help of the image and relic method. In particular, the multifaceted composition "Vidvoyuvavsia" is considered to be the embodiment of the enemy image modelling idea as it was visually reproduced, among the broken German equipment could be found a famous photo of a front-line cameraman Semen Stoyanovsky depicting a killed young Wehrmacht soldier. Nearby there were letters from German women and children to their husbands and parents at the front, which included despair and the curse of war (Fomina, 2013, pp. 35–36). The visual construct is modelled in such a way that it evokes emotions and humanistic feelings in a viewer, draws attention to universal values. The authors lead the visitor to think that violence and killing of people, whoever becomes the victims of a murderous war, are unacceptable.

The viewer's perception of the visual construct not only activates the flow of consciousness but also activates the sensory perception of the museum visual space. In psychology there is a term "perceptual" (Usmanova, 2013), which reflects the connection between the inner and outer world of a human being through the reactions of senses. The task of the museum visualization authors is to draw the visitor's attention to the museum construct with the help of such artistic means as metaphor, symbol, sign. The vivid example of metaphor use in a visual construct is the exposition of M. Bulgakov Literary Memorial Museum in Kyiv, built on the contrast of colours – white, which symbolizes the work of the writer, and the colours of authentic things – about his life.

While establishing perceptual contact between the visitor and the visual construct, the process of vision becomes relevant, when the expressiveness of the visual construct evokes certain associations, analogies or allegories in the viewer. In this context, the original concept was implemented at Chornobyl National Museum in Kyiv, where the Ukrainian embroidered towels represented towns and villages from the exclusion zone. Their inhabitants were forced to leave their socio-cultural space and move to new places of residence. The embroidered towels symbolized the great tragedy of every person in the polluted area. The purpose of such a visual construct is to promote the sensory development of the visitor and the ability to empathize with the presented events and facts.

The visual technologies are aimed at a human sensory perception of a visual space. At the same time, the museum practices of creating a visual construct, in addition to a sensory factor, take into account the age, social, professional, and nowadays inclusive characteristics of the audience.

Nowadays special focus is on the inclusive characteristics of society, and museums in Ukraine do everything possible to turn the institution into an open space for each of its citizens. It is not only about free admission to museums, but also about creating an environment in which the disabled visitor could feel free and comfortable among the museum exhibits. For

instance, visually impaired visitors in numerous museums around the world are offered the so-called “touch tours” (from the English to touch) by prior arrangement or at a certain time (Graven, et al, 2020). Therefore, the literary memorial house museum of T. H. Shevchenko’s “Khata na Priortsi” in Kyiv, using the above-mentioned technique, expands access to information about the visual construct owing to Braille cards and by touching the museum exhibit. A visitor with special needs could discover the functionality of the museum object with the help of a guide.

The Museum of Darkness in Kyiv is considered to be another example of inclusion. It is common knowledge that 80% of all information a person gets through the eyes. Due to the concept of “inability to see”, the museum helps to develop other senses: a touch, taste, smell, sense of balance and proprioception (feeling your own body in space). But the paramount thing is that the museum space helps everyone else to understand the world of blind people. The visual construct is invisible, but, as a result of this approach, it evokes empathy, compassion, complicity and other feelings. Museums use imagery, meaning, and emotion, but scholars actively debate concerning the extent to which the visual information or interpretation is used for visually impaired audiences (Hutchinson & Eardley, 2020).

In contrast to a rapid increase in modern visual and virtual world of diverse spectacles, which, according to scholar I. Malkovskaya, can destroy a person’s personal identity (Malkovskaya, 2008), the museum visuality develops artistic thinking of a person, forms the worldview, influences and changes his/her inner world.

Deciphering the museum construct, the visitor interprets, comprehends the meanings embedded in it. The French philosopher Paul Ricoeur considered the potential abilities and productivity of interpretation as a means of identifying the process of interpretation (Riker, 2002, p. 44). To the museologist interpretation performs the work of decoding the content and meanings and forms the basis of the visual construct, which serves as a means of forming new knowledge. Historical representation plays an important role in the process of interpreting the visual construct. Considering the category of historical representation as a tool in the construction of images of the past and an instrument of public perception of reality, the Polish researcher Marek Wozniak in his book “The Past as Subject of Construction. On the Role of Representation in Historical Research” put emphasis on the fact that the construction of images that structure reality, and the attempt to understand them in modern realities, are inherent in the local, not universal cultural community (Troian, 2012, p. 221). The visual construct is also a work of imagination, which in the process of vision and interpretation is transformed into a means of enriching the spiritual world of the individual. The ability to decode a visual construct through images and ideas develops creative thinking in the visitor, which contributes to the growth of his/her visual selectivity and perception.

The subject area of the museum, according to a theorist and practitioner of museum affairs from Canada D. Cameron, should be clear to the visitor (Ilyina, 2018, c. 318). It can be stated that the visual construct in museology strengthens the human-creative function of the museum (Verbytska, 2016, p. 22). It is important to strike the right balance between verbal and visual material in the museum space, so that the viewer understands the language of objects, sees and deciphers the information encoded in museum constructs. The perception of museum visuality also occurs through verbal communication of museum workers (guides) with the audience. According to D. Cameron, it should be a museum psychologist, a museum sociologist, whose task is “not to translate visual expressions into a verbal form but to teach visitors the language of objects, regardless of their age” (Verbytska, 2016, p. 22).

Professor from Lviv L. Verbytska, speaking about the non-verbal language of objects in the museum exposition, puts emphasis on the human senses involvement in communication with the museum objects and the advantages of non-verbal language over acoustic and tactile in the museum. Owing to vision, cognition, visual perception, empathy a variety of intellectual, emotional and sensory channels are activated when the visitor stays in the museum environment. At the same time, the researcher focused on new challenges for museums, when their attractiveness could be achieved not so much by the content of the exhibition, but by its successful visual presentation (Verbytska, 2016, pp. 23–24). In order to achieve this purpose new ideas, original plot-image symbolism, means of emotional display and animation of museum expositions, technical means are introduced. Modern museum practices are closely linked to the use of information technology. The technical innovations give opportunity to expand the content of exhibition, through audio and video effects to enhance its emotional perception of the visitor. Creative combination of museum construct with modern multimedia technologies not only expands the audience of visitors, including a large number of young people, but increases the effectiveness of communication with the audience significantly, has a positive effect on its intellectual and emotional development (Truels & Fisher, 2021).

**The Conclusions.** Theoretical principles and interdisciplinary nature of visual studios expanded the scientific and practical possibilities of museology significantly. The museum, as a crucial socio-cultural institution, enriched its own research tools with original methods and means of visualizing the museum space. Museum visuality, as a special form of visual culture, received a new impetus to the disclosure of its artistic and cognitive potential. Visual technologies applied in museum practices stimulated a new look at the visual construct, which was transformed into a prominent segment of visual culture with its own specifics of figurative representation, interpretation of symbols and emotional and mental perception of a human being. Due to the changes in approaches to the visual construct, as a communicative element of the interaction between the visitor and the museum, strengthened its impact on the socio-cultural space.

**The Prospects for Further Research.** The museum construct in the system of visual culture received new perspectives of theoretical and practical improvement. In the context of the development of visual studios and integration processes in scientific knowledge, an important task is to develop an interdisciplinary theoretical and methodological framework of the modern direction, which will open new horizons for museology and museum visuality. In particular, under the conditions of continuous development of innovative technologies, visual technologies in museology need to be improved in order to reveal the potential of the visual construct, with its source, monumental, cognitive, aesthetic and communicative content. It is essential to develop educational programmes for the younger generation on cultural visual thinking, decoding and interpretation of the museum construct.

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**THE FIGURE OF HETMAN PETRO SAHAIDACHNY  
IN UNDERSTANDING OF MODERN POLISH HISTORIOGRAPHY**

**Abstract.** *The purpose of the research* consists in clarifying the features of modern vision of strategies and a historical role of Hetman Petro Sahaidachny in the Polish historiography. **The methodology of the research** involves the use of symbiosis of comparative studies methods, contextual analysis, convergence from the abstract to the concrete and vice versa. **The scientific novelty** is determined by the fact that the approaches of modern Polish historians to conceptualization of Petro Sahaidachny's activity have been clarified; the intellectual bases of the formation of the field of interpretation have been determined; and the Polish discourse has been inscribed in the modern historiographical context; echoes with ideas developed in other historiographies have been observed. **The Conclusions.** Modern scientific understanding of P. Sahaidachny's activities and historical role by the Polish historians is strongly influenced by the penetration into the discourse of the issue, related to clarifying the identity of the rus'ka nobility, the Orthodox model of the "rus'ky people", the involvement of the Cossacks in the struggle for the protection of the Orthodox faith, "the rights and freedoms of the rus'ky people". These

issues led to enrichment of P. Sahaidachny's scientific image in the Polish historiography. The military component, which traditionally dominated and prevails nowadays, was balanced by factors arising from the evolution of the Cossack demands from purely caste to the idea of the Cossacks as a member of the "rus'ky people" and a defender of its interests within the Polish-Lithuanian Commonwealth. P. Sahaidachny's modern image includes his achievements as a commander and organizer of an extraordinary role of the Zaporozhian Army in the wars of the Polish-Lithuanian Commonwealth, as well as political concepts about the place and role of the Cossacks in the Ukrainian society. The majority of conceptual positions that are in a scientific circulation in the Polish historiography resonate with the visions of the Ukrainian historians regarding the interests of P. Sahaidachny within the Polish-Lithuanian Commonwealth.

**Key words:** Petro Sahaidachny, modern Polish historiography, concepts, scientific ideas, key trends.

## ПОСТАТЬ ГЕТЬМАНА ПЕТРА САГАЙДАЧНОГО В ОСМИСЛЕННІ СУЧАСНОЇ ПОЛЬСЬКОЇ ІСТОРІОГРАФІЇ

**Анотація.** Мета дослідження полягає у з'ясуванні особливостей сучасного бачення в польській історіографії стратегій та історичної ролі гетьмана Петра Сагайдачного. **Методологія дослідження** передбачає використання симбіозу методів компаративістики, контекстуального аналізу, сходження від абстрактного до конкретного і навпаки. **Наукова новизна** визначається тим, що з'ясовано підходи сучасних польських істориків до концептуалізації діяльності Петра Сагайдачного, визначено інтелектуальні підстави формування інтерпретаційного поля, а польський дискурс уписано в сучасний історіографічний контекст, спостережено перекуки з ідеями, опрацьованими в інших історіографіях. **Висновки.** Сучасне наукове осмислення польськими істориками діяльності й історичної ролі П. Сагайдачного перебуває під потужним впливом проникнення в дискурс проблематики, пов'язаної зі з'ясуванням тотожності руської шляхти, православної моделі "народу руського", утягування козацтва в змагання за захист православної віри, "прав і свобод народу руського". Це привело до збагачення наукового образу П. Сагайдачного в польській історіографії. Військова складова, що традиційно домінувала й переважає нині, була врівноважена врахуванням чинників, які впливали з еволюції козацьких вимог від суто станових до ідеї козацтва як члена "народу руського" й оборонця його інтересів у рамках Речі Посполитої. Сучасний образ П. Сагайдачного охоплює його досягнення як полководця й організатора непересічної ролі Війська Запорозького у війнах Речі Посполитої, а також політичні концепції щодо місця й ролі козацтва в українському соціумі. Більшість концептуальних положень, які перебувають у науковому обігу в польській історіографії, перекукуються з візіями українських істориків щодо інтересів П. Сагайдачного в рамках Речі Посполитої.

**Ключові слова:** Петро Сагайдачний, сучасна польська історіографія, концепції, наукові уявлення, ключові тенденції.

**The Problem Statement.** The figure of Petro Konashevych-Sahaidachny was always in the focus of the Polish historiography, which is quite natural, taking into consideration his famous military victories "for the glory of the King and the Polish-Lithuanian Commonwealth", and because of the powerful ideological influence on the development of relations between the Cossacks and the nobility and Warsaw. Among the Cossack hetmans P. Sahaidachny belongs to a small cohort of those who "reserved" a permanent place in the Polish conceptual visions of the history of the Cossacks, Ukraine and the Polish-Lithuanian Commonwealth. In modern Polish historiography of the early modern period, the development of which is marked by a clear departure from the previously dominant concepts of "a home war" and "a sword and plow" (Maslak, 2014, p. 47), scientific interest in the historical role of P. Sahaidachny increased due to a significant transformation of approaches to assessing the genesis of the era of Bohdan Khmelnytsky and transformation of the Cossacks into the heart of a new Ukrainian elite. Interpretation of the view on the relations between the Cossacks and the nobility, represented

by P. Sahaidachny, and the model of B. Khmelnytsky, which ultimately determined the future fate of both Ukraine and the Polish-Lithuanian Commonwealth, again came to the fore as a significant factor in new (or modified) readings of early modern Ukrainian history and the Ukrainian-Polish relations. There were also discussions about this issue, reinforced by the growing interaction between the Ukrainian and Polish historiographies. Thus, in modern Polish historiography a detailed elucidation of the conceptualization peculiarities of two alternatives that originated from the Ukrainian Cossacks, is important to create an adequate idea of the latest interpretive trends in the field of early modern Ukrainian history in general.

**The Analysis of Resent Researches.** Despite obvious significance of the issue, it has not been the subject of a special study yet. Increased scientific interest in the achievements of modern Polish historiography against the background of early modern history of Ukraine and the Ukrainian-Polish relations of that time, which has been observed recently, including modern processes in it (Isaienko, 2020; Maslak, 2014, Stepanchuk, 2018; Nagielski, 2010; Bobiatynskyy, 2008; Petkevych, 2007), focused immediately on the milestones in the history of the Ukrainian-Polish relations (the middle – the second half of the XVIIth century). Currently we have a number of valuable observations which are important intellectual inspirers. In particular, the conclusions of T. Khynchevska-Hennel and N. Yakovenko about the “conceptual revolution” in the Polish historiography of 1960 – 1970 as a starting point for the latest research approaches serve as a significant impetus (Chynczewska-Hennel, 1985, pp. 285–291; Yakovenko, 2010, pp. 83–88). Within the framework of a comparative study of the interpretation specifics of the concepts of B. Khmelnytsky and P. Sahaidachny by modern Polish historians, thorough studies and conclusions of V. Maslak become important on the latest trends in the interpretation of the nature and typology of the Ukrainian National Liberation War in the Polish historiography, as well as the evolution of B. Khmelnytsky’s political programme (Maslak, 2014, pp. 55–59; pp. 70–101). Finally, D. Kolodzeychuk’s review of one of M. Franz’s monographs, in which an attempt was made to compare the ideas of P. Sahaidachny and B. Khmelnytsky, contains important observations (Kołodziejczyk, 2007, pp. 575–586).

**The purpose of the research** is to study in detail the current discourse in the Polish historiography concerning the role of P. Sahaidachny in the history of early modern Ukraine and the Polish-Lithuanian Commonwealth, to trace the interactions of the Ukrainian and Polish historiography in this segment. The concept of “modern Polish historiography” covers the period that began after the significant events in Poland and throughout Central and Eastern Europe at the end of the 1980s.

**The Results of the Research.** Four interrelated factors, including Hetman’s victorious raid on Moscow in 1618, his extraordinary role in the Khotyn War of 1621, and his decisive contribution to the restoration of the Orthodox hierarchy in Ukraine, elaboration of the strategy for the Zaporozhian Army within the framework of the Polish-Lithuanian Commonwealth, traditionally glorified in the eyes of the Polish historians the figure of P. Sahaidachny, elevated him above the general Cossack officers of the first half of the 17th century, among whom there were many famous and colourful figures. All of them are at the center of modern Polish discourse, stimulating the introduction of P. Sahaidachny to the circle of people worthy of a special place in the Ukrainian and Polish history of early modern times. But its main difference from previous analogues is that at the same time the issue was presented earlier only superficially and without a clear trace in broader contexts: Petro Sahaidachny and identity formation among the Zaporozhian Army and involvement of the Cossacks in the

defense of “the rights and freedoms of the rus’ky people”. It can be even said that this aspect came to the fore over time to conceptualize the historical role of the figure of P. Sahaidachny.

On the one hand, a powerful stimulus for this was the appearance of a pioneering study by Teresa Khynchevska-Gennel in the Polish historiography in 1985 “National Consciousness of the Ukrainian Nobility and the Cossacks from the End of the XVIth to the Middle of the XVIIth Century”, which provoked a mixed reaction among the Polish intellectuals (Gawlas, Grala, 1986). However, later it inspired the growth of scientific interest in this segment of the history of the Ukrainian nobility and the Cossacks. At the same time, the Polish historians had to respond to an active discourse on early modern elites and the Cossacks, which has been going on in the Ukrainian historiography for more than two decades (Brekhunenko, 2014; Sas, 2010; Shcherbak, 2000; Yakovenko, 2008; Plokyh, 2001). At the intersection of both factors, in modern Polish historiography, the image of Hetman was enriched by further development and interpretation of the problem of including the Cossacks of the era of moral leadership P. Sahaidachny in the Zaporozhian Army in the development of the Orthodox model of rus’ka identity.

The largest conceptualization of this problem belongs to the pen of Mariusz Drozdowski – a student of T. Khynchevska-Gennel, made, quite naturally, within the study of the religiosity of the Ukrainian Cossacks. Based on the tradition the most clearly represented in the Ukrainian historiography, the researcher associates the whole period in the history of the Zaporozhian Army with the name of P. Sahaidachny: “The beginning of this new period in the contacts of the Cossacks with the Orthodox Church determines, as we should judge, certainly the fact that Petro Konashevych-Sahaidachny took over power over the Cossack society” (Drozdowski, 2008, p. 780). At the same time, the researcher modifies the dominant view (also available in the Polish historiography, starting with V. Tomkiewicz (Drozdowski, 2008, p. 36) as to the fact that the important year in the involvement of the Cossacks in religious affairs became the year of 1620 allegedly (Drozdowski, 2008, pp. 78–92). Absorbing the works of S. Oparina, Y. Mytsyk, S. Plokyh, which can be seen even from the correspondent citations, M. Drozdowski writes about the crucial for the Orthodox cause participation of the Cossacks led by P. Sahaidachny in “Theophanes’ ordination” as a kind of result of previous practices protection of the Orthodox faith (Drozdowski, 2008, pp. 94–95, 236).

Another significant feature of M. Drozdowski’s approach, which clearly distinguishes him from the Polish historians, is that he does not limit the horizons of the Cossacks only to a religious confrontation between the Orthodox, on the one hand, and the Catholics and the Uniates, on the other hand. The researcher closely connects the Cossacks’ interference in religious relations in the Polish-Lithuanian Commonwealth with the emergence of the concept of Cossack membership in the “rus’ky people” with all the consequences for the social role of the Zaporozhian Army. The researcher clearly focuses on the theses of T. Khynchevska-Gennel (Drozdowski, 2008, pp. 88–93), as well as the results of recent research by S. Plokyh (Plokyh, 2001, pp. 145–175), insisting that “the involvement of the Cossacks in the defence of the rights of the Orthodox Church was one of the reasons for the formation of their class consciousness, as well as, primarily, national consciousness” (Drozdowski, 2008, p. 237). However, M. Drozdowski did not bring his position to the level demonstrated by the St. Petersburg researcher T. Tairova-Yakovleva with her direct identification of the involvement of the Cossacks in religious affairs with the emergence of the state idea in their environment (“under those conditions, the struggle for the Orthodoxy was a political struggle for the national self-consciousness, and the state idea”) (Yakovleva, 1997, pp. 51–59). It is worth noting that the

intellectual idea of T. Tairova-Yakovleva was not properly discussed even in the Ukrainian historiography, where the ideological imperatives of the Cossack officers of the end of the XVIth – the first half of the XVIIth century are actively studied nowadays.

However, it should be recognized that the generalizations of T. Khynevska-Gennel and M. Drozdowski did not become mainstream in Poland for the conceptualization of the place and role of P. Sahaidachny. Probably, this fact can be explained by the general restrained attitude to the problem of the nobility identity, not to mention the worldviews of the Cossacks, deprived of elitism reflection. It is not paid much attention, and it is also not openly questioned (as it was in the 1980s, after the publication of the above-mentioned monograph by T. Khynevska-Gennel), trying to emphasize the sense of belonging of the *rus'ka* elite to the noble people of the Polish-Lithuanian Commonwealth, integration successes of the ideology of sarmatism, etc. Here is how, for example, the figure of P. Sahaidachny is presented in the publication “Poland. Essay on History”, translated into Ukrainian for the Ukrainian reader: “Petro Konashevych-Sahaidachny (1570 – 1622) was one of the most prominent leaders of the Cossack units during the period before the uprising outbreak of 1648, honored in the wars of the Polish-Lithuanian Commonwealth with Muscovy and Turkey... He led many Cossack campaigns to the Turkish possessions along the Black Sea coast. He made friends with the royal family. He remained loyal to the Polish-Lithuanian Commonwealth, leading the troops in the wars with Muscovy and Turkey. Owing to the participation of the Cossack troops led by him in the battle of Khotyn in 1621, the Polish-Lithuanian Commonwealth troops managed to stop the offensive of the Turkish army” (Mendzhetskyi & Bratsyevych, 2015, p. 123).

This position distinguishes modern Polish approaches from the dominant ideas of the Ukrainian historiography, which emphasizes the problem of involving the Ukrainian Cossacks into the process of forming a set of ideas in line with the “*rus'ky* people” (Brekhunenko, 2011, pp. 276–293; Sas, 2010, pp. 323–340; Ploky, 2001, pp. 145–175). Against this background, the appearance of archeographic research is noticeable, in which a number of Cossack documents were published, prepared by the joint efforts of the Ukrainian and Polish historians. In the research the preface deals with the Cossacks’ idea of their place in the “*rus'ky* people” (Brekhunenko & Nahelskyi, 2004, pp. 435–437).

Instead, the main direction of P. Sahaidachny’s presentation is the modern interpretation of the traditional concept, according to which Hetman’s views on the relations of the Cossacks with the nobility and Warsaw embodied the discourse of the moderate part of the Cossacks, willing to compromise. At the same time, during the time of P. Sahaidachny, everything was brought to the level of the elaborated strategy of fighting for concessions from Warsaw in favour of the Zaporozhian Army. After all, it is under this accent that Hetman’s activity is interpreted both in scientific papers and in popular texts. An intellectual consensus was also reached with the Ukrainian historiography, in which there is no alternative to such interpretation approach of P. Sahaidachny’s cornerstone idea. The differences between the constructs of the Polish historians begin at the level of finding out the depth of the compromise, which P. Sahaidachny was ready to reach in relations with Warsaw.

There are two typical approaches. The first one consists in declaring only a general conceptual thesis about P. Sahaidachny’s confession of the idea of understanding with Warsaw, prevention of an armed conflict and military cooperation in the interests of the Polish-Lithuanian Commonwealth. Finding out the deep essence of P. Sahaidachny’s idea, especially its possible evolution, was secondary, which made the structure fragile, giving the impression of uncrystallization and chaos of Hetman’s plans and lowering the threshold of

understanding of intentions by him and his supporters. A clear evidence of this approach is, at least, the above-cited thesis from the book “Poland. Essay on History”.

Another approach involved concretizing the real intentions of Hetman against the background of the development peculiarities of the Cossacks. M. Nagielski, the author of the only complete essay on modern Polish historiography about P. Sahaidachny presented a view, which systematically absorbed the experience of the basic requirements to an officer, testifying to its entry into new horizons of understanding the role of the Cossacks in Ukraine and the Polish-Lithuanian Commonwealth in general: “There is no doubt that he belonged (P. Sahaidachny. – *The authors*) to that group of the Cossack officers, who saw opportunities for cooperation with the Polish-Lithuanian Commonwealth, of course, on condition of concessions by the Polish authorities regarding the Cossacks, both under the auspices of the approval of the Orthodox hierarchy and the increase in the register of the Zaporozhian Army” (Nagielski, 2003, p. 149). The researcher also believed that the role of non-church leaders, including P. Sahaidachny and the Cossacks, was crucial for the restoration of the Orthodox hierarchy in Ukraine (Nagielski, 2003, p. 140). However, the researcher avoided talking about the attitude of P. Sahaidachny and his supporters to the inclusion of the Cossacks into the Orthodox model of the “rus’ky people”, leaving out of his conceptualization the works of T. Khynchevska-Gennel and M. Drozdovsky. The results of the implementation of P. Sahaidachny’s idea into life are also presented without emphasis. It seems that M. Nagielski did not want to write about the collapse of politics, which became so clear after Khotyn of 1621 and paved the way for the future Cossack uprisings. The researcher limited himself to a milder phrase that “the authorities of the Polish-Lithuanian Commonwealth did not draw any conclusions from the rapid growth of the Cossacks, limiting the registered army to a number that the Cossacks could not admit”; “Unfortunately, Sahaidachny failed at achieving anything for the Zaporozhian Army” (Nagielski, 2003, pp. 147–148).

On the basis of the emphasis on the moderate line represented by P. Sahaidachny in Polish historiography, a contrasting comparison of the political concepts of P. Sahaidachny and B. Khmelnytsky appeared. This intention, no doubt, contains a rational grain, but its embodiment by Maciej Franz in the study of the history of the Cossack state was unsuccessful and was criticized in a review by Dariusz Kołodziejczyk, as, after all, the whole monograph. The reviewer accused the author of the research apparatus weakness, poor knowledge of the historiographical situation and the lack of a representative source base, which led to the proclamation of unsubstantiated theses that can only surprise (Kołodziejczyk, 2007, pp. 580–583). Among other things, D. Kołodziejczyk focused on a rude and straightforward “opposition of the “good hetman” from Khotyn to the “evil hetman” Bohdan Khmelnytsky, who dared to rebel against the Polish-Lithuanian Commonwealth” (Kołodziejczyk, 2007, p. 583).

The essence of the problem for M. Franz was that B. Khmelnytsky’s political conceptions at a certain stage resulted in the idea of breaking with the Polish-Lithuanian Commonwealth, while P. Sahaidachny did not consider such scenario at all. Thus, the first one deserves ostracism on the part of the Polish historians, because, as V. Maslak observed, M. Franz is a supporter of cultivating a specific “point of view of the Polish historiography”, which, in fact, activates the ideological factor in scientific approaches (Maslak, 2014, p. 58). The credo of the researcher concerning the assessment of P. Sahaidachny objectively reflects the following thesis: “Konashevych, well-prepared and educated, saw the great Cossacks on the side of the Polish-Lithuanian Commonwealth, but as an important and self-governing military and political factor on which Poland could base its actions on these lands” (Franz, 2005, p. 391).

And further – Hetman “never considered the possibility of development of this society in disputes with the Polish-Lithuanian Commonwealth, and considered the greatest threat – the Russian power, which was dormant at that time. If we compare this with the fatal politics and the same skill of political assessment of Bohdan Khmelnytsky, the assessment of the figure of the most prominent Cossack Hetman of the first half of the XVIIth century will look even more interesting” (Franz, 2005, p. 391).

Within the framework of his own interpretive model, the researcher is looking for any opportunity to glorify P. Sahaidachny at the expense of B. Khmelnytsky, as a result of which the former is attributed intellectual achievements, which currently cannot be found in a source basis. Thus, P. Sahaidachny appears as a generator of the idea of the “Cossack state” in the Polish-Lithuanian Commonwealth (exclusively so): “During the first half of the XVIIth century the idea of the Cossack statehood appeared among the elites of the Cossack society in the Ukrainian lands, and Petro Konashevych-Sahaidachny should be recognized as its creator”. M. Franz sees the reasons for such a radical conclusion in the military activity of Hetman, as well as in “the attitude to the church, the creation of the foundations of unity with the Ukrainian people, the development of social ties” (Franz, 2005, p. 392).

Obviously, this was not without the influence of T. Tairova-Yakovleva’s idea, although the book by M. Franz does not contain the relevant work of St. Petersburg researcher in the bibliography. However, T. Tairova-Yakovleva did not write about the officer’s direct awareness of the fact that his actions are connected with the “state idea”, but only about the possibility of today’s interpretation of support for the Orthodoxy as an action aimed at generating the “state idea” in society. Instead, M. Franz believes that this idea was developed earlier, and B. Khmelnytsky took it ready, and therefore is “only the executor of certain ideas that were created during the days of P. Sahaidachny, later developed by Metropolitan Petro Mohyla” (Franz, 2005, p. 390).

Another conceptual statement, which has no basis, is the thesis that P. Sahaidachny allegedly clairvoyantly saw in Moscow the greatest threat to the Cossacks (Franz, 2005, pp. 390–392). If, attributing the development of the “state idea” to Hetman, M. Franz still tried to argue his point, in this case he avoided argumentation, mentioning only that the free Cossacks were not beneficial to the Moscow autocracy. It seems that the researcher became a hostage of his own strategy to oppose P. Sahaidachny and B. Khmelnytsky. Moreover, according to M. Franz, until 1653 the Cossacks, in relations with Moscow, followed the path paved by P. Sahaidachny, whose policy towards Moscow was “always hostile” (Franz, 2005, p. 392). Finally, as noted by D. Kołodziejczyk (2007, p. 582), the author’s thesis that the goal of the Cossack naval campaigns was to weaken Turkey and prevent the Black Sea trade is surprising.

At the same time, despite the above mentioned, M. Franz has several inspiring observations. The researcher persistently expresses the right opinion about the continuity between the set of ideas of the Cossack officers of the first half of the XVIIth century and B. Khmelnytsky’s political conceptions, which became a “fresh word” in modern Polish historiography and resonates with the approaches of the Ukrainian historians. It is important to think that even during the time of P. Sahaidachny the Cossacks saw a direct threat to their existence in the magnate’s colonization, so it seems fruitful to compare the Turkish-Tatar option of P. Sahaidachny with the concepts of Jan Zamoyski (Franz, 2005, pp. 390–392).

Traditionally the military component of P. Sahaidachny’s activity enjoyed the greatest attention in the Polish historiography. There was a consensus on the recognition of a significant role of Hetman in the military campaigns led by the Polish-Lithuanian Commonwealth, in particular, in the expedition of King Vladyslav to Moscow in 1617 – 1618 and the Khotyn

War in 1621 (Borek, 2001, pp. 258–311; Drozdowski, 2008, pp. 108–114; Majewski, 2006, pp. 147–149; Nagielski, 2010, pp. 144–150; Serczyk, 2008, pp. 235–239). Researchers emphasize the fascinating responses among the Polish-Lithuanian nobility after the victory near Khotyn, citing abundantly Ukrainian (K. Sakovych. Ya. Yerlych), and Polish (Sh. Starovolsky, V. Potocki, J. Sobieski) contemporaries, who colorfully described the military skills, virtues of P. Sahaidachny and his contribution to the overall victory over the Ottoman army (Nagielski, 2010, pp. 149–150). M. Drozdovsky and M. Nagielski emphasized an important point: under the influence of the Cossack military services of the Polish-Lithuanian Commonwealth during the period of P. Sahaidachny, an attempt was made among the Polish intellectuals to inscribe the Cossacks in the Sarmatian myth, (which gave additional impetus to the competition of the Cossacks for a place in a closed club of social elites. Hetman Sh. Starovolsky was included in the group of 130 most famous Sarmatian commanders) (Drozdowski, 2008, p. 114; Nagielski, 2010, p. 150). In this fact, the position of both researchers echoes the observations of S. Ploky (Ploky, 2001, pp. 19–175).

M. Nagielski, however, penetratingly observed a notable feature of reception of P. Sahaidachny, which had not been considered before – the heterogeneity of Hetman's opinion in his eyes. Along with respect, there were critical assessments, in particular, from the Lithuanian Hetman Lev Sapiga. The latter accused P. Sahaidachny of ambiguity regarding the problem of defence against Muslim neighbours, which consisted in contacts with the Tatars by refusing to help the quartz army in repelling the Tatar attack of 1615 (Nagielski, 2010, p. 132).

It should be noted that modern Polish historians joined the process of archeographic publication of documents, which dealt with the activity of P. Sahaidachny. At first, in his monograph M. Drozdowski re-published (after Yu. Mytsyk) a letter from Hetman to the Polish Lithuanian Hetman K. Radziwill dated January 13, 1622, and later in Ukraine, Krakow researcher A. Bedrzhyska published a set of documents of the Cossack commission from January 1622 on the basis of one of the copies (Drozdowski, 2008, pp. 267–268; Bedrzhyska, 2006, pp. 523–532).

**The Conclusions.** Among the Polish historians modern scientific understanding of the activities and historical role of Petro Sahaidachny reflects the essential convergence of approaches and interpretations with the Ukrainian historiography. It seems that there has been a final departure from the narrow interpretation of the figure of Hetman through the prism of an exclusively military component. Rooting in modern Polish historiography of the discourse on the identity of the nobility, national and religious competitions of the “rus’ky people”, the involvement of the Cossacks in these competitions resulted in the enrichment of the scientific image of P. Sahaidachny by taking into account the factors, which followed from the evolution of the Cossack demands from a purely caste to the idea of the Cossacks as a member of the “rus’ky people” and a defender of its interests within the Polish-Lithuanian Commonwealth. It is noteworthy that the majority of the conceptual provisions that are in scientific circulation in Poland resonate with the visions of the Ukrainian historians. This creates a good basis for further synergy of research, in particular, on the basis of the anniversary of the Khotyn War of 1621.

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**UKRAINIAN-POLISH INTERCULTURAL COMMUNICATION  
IN THE BORDER AREAS  
(THE END OF THE 20<sup>th</sup> – THE BEGINNING OF THE 21<sup>st</sup> century)**

**Abstract.** *Integrative processes of the 21<sup>st</sup> century resulted in a new configuration of international relations in the eastern borders of the European Union. It was particularly evident in the Ukrainian-Polish border defined by the boundary that was established after the World War II. The purpose of this*

**article** is scientific interpretation of active forms of the Ukrainian-Polish intercultural communication, induced by religious, denominational, and commemorative factors, as well as an analysis of a phenomenon of cross-border coexistence amidst the processes of Eurointegration at the end of the 20<sup>th</sup> – the beginning of the 21<sup>st</sup> century. **The research methodology** covers a wide spectrum of interdisciplinary scientific approaches developed by ethnology and cultural anthropology. Scientific apprehension of the Ukrainian-Polish relations in the categories Ours – Alien – Other based on the typology of memory studies – individual-communicative-cultural – made it possible to trace the nature of self-identification of residents in the Ukrainian-Polish border areas and measure the influence of religious and memorial factors on the Ukrainian-Polish intercultural borderline communication on the verge of centuries in the most effective way. **The scientific novelty** of this article consists in spotting typical mechanisms of intercultural and state-to-state Ukrainian-Polish interaction, definition of the role of historical stereotypes as consolidative power for the preservation (or failure to do it) of common historical heritage and building the Ukrainian-Polish relations in accordance with the traditions of European value landmarks. **The Conclusions.** The present-day Ukrainian-Polish border is a reflection of a socio-cultural phenomenon based on shared historical experience, collective memory, and negative/positive stereotypes. The conflict potential of the Ukrainian and Polish social relations took the form of disputes regarding the Greek-Catholic Cathedral in Przemyśl and the Cemetery of the Defenders of Lviv resulted from the Soviet suppression of historical memory, cultivation of negative stereotypes, and immaturity of elites. The positive aspect manifested through institutional activities aimed at preservation of cultural heritage by the means of Ukrainian and Polish publishing, exhibition and restoration projects, as well as intercultural discourse.

**Key words:** the Ukrainians, the Poles, border areas, ours–alien–other; Przemyśl, Lviv, cultural heritage, historical memory.

## УКРАЇНСЬКО-ПОЛЬСЬКА МІЖКУЛЬТУРНА ВЗАЄМОДІЯ НА ПОГРАНИЧЧІ (КІНЕЦЬ ХХ – ПОЧАТОК ХХІ ст.)

**Анотація.** Інтеграційні процеси початку ХХІ ст. спричинили нову конфігурацію міжнаціональних відносин на східних кордонах Європейського союзу. Особливо це проявилось на українсько-польському пограниччі, визначеному кордоном, сформованим після Другої світової війни. **Метою пропонуваної статті** є наукова інтерпретація активних форм українсько-польської міжкультурної взаємодії, вираженої релігійно-конфесійним та комеморативним чинниками, а також аналіз феномену транскордонного співжиття в умовах євроінтеграційних процесів кінця ХХ – початку ХХІ ст. **Методологія дослідження** охоплює широкий спектр міждисциплінарних наукових підходів, розроблених етнологією та культурною антропологією. Наукове осмислення українсько-польських відносин в категоріях Свій – Чужий – Інший та інтерпретація польового матеріалу за типологією студій пам'яті – індивідуально-комунікативна-культурна – дала змогу максимально об'єктивно простежити особливості самоідентифікації мешканців українсько-польського пограниччя, визначити вплив релігійно-конфесійного та пам'яттєвого факторів на українсько-польську міжкультурну взаємодію на пограниччі на зламі століть. **Наукова новизна** роботи полягає у виявленні типових механізмів міжкультурної та міждержавної українсько-польської інтеракції, визначенні ролі історичних стереотипів як консолідаційного потенціалу для (не)збереження спільної історичної спадщини й побудови українсько-польських відносин у традиції європейських ціннісних орієнтирів. **Висновки.** Сучасне українсько-польське пограниччя виражає суспільно-культурний феномен, заснований на спільному історичному досвіді, колективній пам'яті, негативних / позитивних стереотипах. Конфліктний потенціал українсько-польських суспільних відносин був виражений конфліктами довкола греко-католицької катедрі в Перемишлі та Цвинтаря Орят у Львові як наслідків радянського замовчування історичної пам'яті, культивуванням негативних стереотипів, незрілості еліт. Позитивний вимір характеризував інституційну діяльність, спрямовану на збереження культурної спадщини через українсько-польські видавничо-виставкові та реставраційні проекти, міжкультурний діалог.

**Ключові слова:** українці, поляки, пограниччя, свій – чужий – інший, Перемишль, Львів, культурна спадщина, історична пам'ять.

**The Problem Statement.** The phenomenon of multiculturalism and multiplicity of forms of identity at the international borders of modern Europe is an important scientific problem given the nature of integration processes of the last decades and extension of the system of European values towards the east. In terms of the Ukrainian-Polish relations, the matters of shared cultural heritage, mutual myths and stereotypes, and the potentiality of historical memory to generate conflicts remain unresolved, especially since the Republic of Poland joined the European Union in 2004. They are still highly relevant while the Ukrainians and the Poles are actively integrating on the political, economical, and cultural levels, attempting to build a new concept of good relations between neighbors mutually beneficial development.

**The Analysis of Recent Research Works and Publications.** Interdisciplinary studies of inter-ethnic relations in the last decades are conducted in line with the cognitive category of *otherness*. Traditional research paradigms based on the dichotomy *ones of our own – the alien ones* evolved in the direction of the problem *we – others*, where the *neighborly others* transitioned from the category of the unknown to the position of members of multi-ethnic and multicultural societies in the political states of the world (Burszta, 2004, p. 26). Adoption of the above-mentioned category is particularly relevant for the study of the phenomenon of borderline areas and inter-ethnic relations in those areas. Given the historical intensity of inter-ethnic contacts (existence of shared congregation clusters, such as markets, fairs, and pilgrimage sites on the Ukrainian-Polish border, the ethnic endogamy manifested in business, scientific, and cultural relations becomes increasingly intensive) (Obrebski, 2005, p. 95).

Political demarcation of the present-day Ukrainian-Polish border in 1951 not only reshaped the nations and their identities, but significantly influenced the transformation of the image of *the alien* through the lens of emerging neoteric historical myths and stereotypes (Chunikhina, 2020, p. 306). The role of border as a barrier of self-identification between *ones of our own* and *the alien ones* resulted in crystallization of the category of alienated border in the postwar years, “where routine exchange beyond the borders did not exist due to tensions and hostility between those states” (Donnan & Wilson, 2007, p. 77). In the 1970s – 1980s the Ukrainian-Polish inter-ethnic contacts created a new kind of *co-existing border areas* when “neighboring states reduced the tensions between them to the level that made cross-border interaction with a moderate strain in relations possible” (Donnan, Wilson, 2007, p. 77).

Proclamation of independence of Ukraine and democratic transformations in Poland at the beginning of the 1990s gave a boost to evolution of the Ukrainian-Polish borderline into a kind of *interdependent borderline*, primarily characterized by “symbiotic relations between border regions and corresponding states expressed through emergence of bilateral interstate economic, social, and cultural systems” (Donnan & Wilson, 2007, p. 77). Intensification of interethnic contacts, accumulation of new experience, and implementation of joint projects resulted in revival of historical memory within national narratives, as well as (de)construction of positive/negative images as a result (Dziadzia, 2020, pp. 35–36).

Axiomatic claim about the existence of “politically fair borders” being “impossible per se” was supported by the Polish researcher Tadeusz Chrzanowski. According to him, “no nation within the borders established by questionable means of “rightful laws” has no right for an exceptionally laudable history, and one that is often hard to admit. The latter brings no glory; it is a result of wrongs done to others – neighbours, who shared ownership over the given territory up to a certain point. They were made mortal enemies by ideologists of morbid, primarily nationalistic concepts” (Chrzanowski, 2001, p. 8).

Analysis of canons of the Ukrainian and Polish historical memories confirms the point about the existence of “two, often mutually exclusive, memories, formed under and on demands of international divisions” (Zowczak, 2011, p. 61). According to the Ukrainian ethnologist Roman Kyrchiv, the bilateral nature of old stereotypes in the borderline areas is reflected in “mitigation of ethnic self-expression and escalation of the *ones of our own* and *the alien ones* antithesis” (Kyrchiv, 2009, p. 604).

**The Purpose of the Article** is to critically analyze various forms of the Ukrainian-Polish cultural communication, reflected in religious and commemorative factors, as well as to reveal the phenomenon of cross-border co-existence during the Eurointegration processes at the end of the 20<sup>th</sup> – the beginning of the 21<sup>st</sup> century.

**The Results of the Research.** The ending of World War II brought the Ukrainians and the Poles not only huge casualties and material losses, but also newly-formed national borders. Population of the postwar border areas were forced to change citizenship and, occasionally, abandon their property, or even leave their homes. Regarding the emotional-reflectory stance *ones of our own – the alien ones*, the Ukrainian-Polish border remained in a state of uncertainty. The Ukrainian, Polish, and Jewish communities of the border, which prior to World War II accepted each other via the antithesis *we – others*, rather than *us – them*, were forcibly deprived of traditions of multi-culturality and relative ethnic and religious tolerance at the level of interpersonal relationships.

Field ethnographic data collected at the Polish-Ukrainian border in 2008 – 2013 prove the defining role of a language as an identifying factor. For example, residents of Sianky village in Turka Raion of Lviv Oblast treated the Poles as their own because “they spoke our language more, they were local Poles” (AEINASU, f. 1, d. 2, c. 584, p. 5). The Poles differed from the Ukrainians only in praying at the Roman-Catholic churches instead of the Ukrainian ones. On the other hand, the Jews spoke “their own, Jewish language”, while the Ukrainians (who were the majority in rural areas) spoke “our own, Ukrainian language”. Regarding insulting names or conflicts, “There were no such things here. That was something that did not exist” (AEINASU, f. 1, d. 2, c. 584, p. 9). Similar memories were shared by the Poles, who lived in Czarna village near Ustrzyki Dolne: “There was not that much of difference (...) they paid no attention to us (...) they did not bother us and everything was fine” (AEINASU, f. 1, d. 2, c. 622, p. 78).

Negative stereotypes were mostly present in memories about the lack of personal contact experience. As recorded in Halivka in Starosambir Raion of Lviv Oblast, “Everything was peaceful here; it was less of a problem here. Something like that used to happen in the Polish villages. Well, they say, there were villages where those Polish banderas – well, not banderas, but whatever they were called – they took off your gloves. They took gloves off a living man. Over there, towards Boberka, close to the border in the direction of the San. That was the Home Army” (AEINASU, f. 1, d. 2, c. 622, p. 128). The activity of the Polish and Ukrainian guerilla units was often accepted equally in historical memory of borderline inhabitants, resulting in a paradoxical term “Polish banderas”<sup>1</sup>.

For the Poles, who came from former eastern voivodeships of the Second Polish Republic, the negative stereotype about Banderites extrapolated to all Ukrainians. In the village of Bystre near Ustrzyki Dolne of Subcarpathian Voivodeship, a former citizen of Krystynopil (present-day Chervonohrad), who moved to Silesia shared a rather positive memory about the atmosphere of the Ukrainian-Polish relations during the interwar period whilst equating

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<sup>1</sup> We presume that in an average citizen’s lexicon the term “banderite” was a synonym for a person, who fought for their land.

the actions of the UIA with the Ukrainians: “In those years it did not matter whether you were a Ukrainian or a Pole; people got married no matter what. One of my grandfathers was a Ukrainian, while the other one was a Pole” (AEINASU, f. 1, d. 2, c. 622, p. 196). Stereotypical extension of accountability for actions of individual representatives over each member of a society often conflicts with positive/neutral childhood memories about the Ukrainian-Polish relations within the scope of a single locality and emphasis on ethnic heterogeneity of one’s family. Analysis of field data leads to a conclusion that memory of contemporary residents of the Ukrainian-Polish border falls within the so-called “totalitarian pluralism” inherent to public opinion in post-Communism states. It features a concept of majority of residents supporting mutually exclusive ideas, thoughts, and political views (Hrycak, 2009, p. 225). Proceeding from types of memories proposed by the German scientist Jan Assmann, field ethnologic data reflects the confrontation of individual memory with communicative and cultural memory, formed, inter alia, under the influence of tales from other people, as well as mass media in their social environment (Assmann, 2015, pp. 50–93; Prylutska, 2020, p. 211).

Meanwhile, forced monoethnization of the Soviet-Polish borderline territories after the end of World War II put an end to inter-ethnic Polish-Ukrainian military and political conflict. In the context of friendly relations between the “brotherly” Polish People’s Republic and the Ukrainian SSR, all Polish-Ukrainian/Jewish and Polish everyday relations became marginalized (Riabchuk, 2009, p. 260). According to the Polish sociologist Joanna Konieczna, the above-mentioned tradition “ceased to be a part of life of the Polish society and transitioned to the type of individual memory about historical events” (Konieczna, 2001, p. 5).

Nonetheless, the population of those border regions, who managed to stay in their native areas had met new *others of their own* – various specialists, sent from the USSR for establishing a new order. Analysis of expeditionary material showed that new inhabitants of border areas, who came from the east (those included the Ukrainians from the Ukrainian SSR and representatives of other nationalities) had failed to become *theirs* and fully integrate themselves into local communities. The locals, who call the new arrivals “migrants” or “evacuated”, clearly know where from and when the latter came. Sometimes, when misunderstandings between neighbours arise, the newcomers are being reproached and segregated with expressions like “you’re a beggar, you’ve come here, but what have you brought?” and the others (Czmelyk & Mróz, 2010, p. 95).

The collapse of the Soviet Union and democratic processes in the Central-Eastern Europe revitalized the Ukrainian and Polish relations in border areas. The newly-formed type of *mutually dependant frontier* was distinguished by active cooperation of its population regardless of national or religious denomination (Chmelyk, 2017, p. 177). The Ukrainian-Polish border areas saw reconsideration of negative historical stereotypes and emergence of new mutually positive images, reflected in transformations of the categories *them/others*.

Democratic transformations in Ukraine and Poland at the beginning of the 1990-s were distinguished by changes in social structures and value systems, as well as political instability. As metaphorically defined by the Polish historian Andrzej Wyrobisz, the Ukrainian-Polish relations began to feel the impact of “ghouls” of fear, hatred, intolerance, fanaticism, racism, nationalism, and hostility towards anything foreign” (Wyrobisz, 1991). Prejudice towards neighbours also occurred in inter-ethnic communication in the borderline areas, where regained freedom of expression of religious and national beliefs resulted in conflicting interests and expectations in the field of ethno-religious activities and efforts for preservation of heritage, revival of cultural life, and conservation of memorial sites.

Nonetheless, disdain towards the culture of neighbours, appropriation or even complete neglect for traditions and culture of *others* remained major challenges for the two cultures in the border. Activization of nationalistic or chauvinistic socio-political powers caused manipulation of historical interpretations and their politisation (Smoleński, 2001, p. 6). Excessive idealization, non-critical magnification of ethno-cultural features and achievements of one's nation were compensated by marginalizing spiritual, material and cultural advancements of their neighbors. Reputable Polish public figure, editor of the "Kultura" magazine Jerzy Giedroyc recognized the presence of the complex of superiority over eastern neighbours in the Polish mentality (Gedroits', 2000, pp. 5–7). In return, the Ukrainian national ideals in the border areas were reinforced by stereotypical notions about the Ukrainians being inferior to the Poles, similarly to the Germans toward the French and the Czechs towards the Austrians (Bidar, 2006, p. 68).

The destructive nature of national ambitions showed up in the 1990s in the border areas of Przemysł and Lviv. In the Przemysł Voivodship, where 10 to 20 thousand Ukrainians lived (2 thousand living in the city) (Malikowski, 2010, p. 22; Polak, 1991b), a conflict erupted over the transfer of a cathedral to local Greek-Catholics<sup>2</sup>. Restoration of eparchial structures of the Greek-Catholic Church at the beginning of 1991 was met with strong opposition from local Polish Roman-Catholics. The reason for this resistance was the fact of construction of a church for the Carmelite Order two centuries before the cassation of Emperor Joseph II and the transfer of the church to Greek Catholics. For local Ukrainians, the church being built on the foundation of an ancient Orthodox sanctuary and the hierarchs of the Roman-Catholic church agreeing upon giving back the temple to Greek Catholics remained a historical fact.

Having ensuring the support of local Roman-Catholic clerics, the Poles barricaded themselves in the church and protested via the local mass media. Representatives of the Polish community organizations not only rationalized their right for the church, but also blamed the Ukrainians in ruining the Polish cultural heritage in Przemysł. The conflict between the representatives of different denominations of a single church was so severe that the will of His Holiness Pope John Paul II about the transition of the church to Greek Catholics was left unnoticed. In June of 1991, during his visit in Przemysł the Pope gave the former Jesuit church, which stood several hundred meters below, to the Greek Catholic diocese. The appeal of John Paul to the faithful was also eloquent: "Let this diocese form an example of coexistence and unity in pluralism. Let love, tolerance and mutual understanding be stronger than any artificial divisions and disputes. Restoration of old nationalisms and enmity would be acting against the Christian identity" (P., O., 1991; Lytvyn & Khakhula, 2019, pp. 186–187).

The Carmelite church in Przemysł became a symbol of dominance of negative stereotypes among the local population of the border areas. Back in 1994 the Polish "patriotic societies" decided to dismantle the Byzantine-style dome of the church built by Greek Catholics in the 19<sup>th</sup> century. Having obtained the local landmark conservator's permit and declaring the necessity of returning its original look to the sacred object, the Poles took apart the Byzantine dome in 1996 (Malikowski, 2010, pp. 21–39). Symbolically, the 400<sup>th</sup> anniversary of the Union of Brest fell on that year. The Union was a symbol of unity of the Eastern and Western traditions, but the celebration ceremony was held in the nearby city of Jarosław (Hann,

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<sup>2</sup> There were 129 active Ukrainian churches and 193 cemeteries in the Przemysł Voivodship. Branches of the Ukrainian Union in Poland, the Ukrainian People's House in Przemysł, the Bishop Hryhoriy Lakota Scientific Society in Jarosław, the Ukrainian Independent Youth Society, Dubrava folkloristic society with a center in Chotyniec, and others were the centers of national cultural life.

2001, pp. 190–193). Thus, the conflicts in Przemyśl had shown how much “religious matters (namely, formal and legal, involving relations between different denominations subject to single jurisdiction in Rome) weigh upon the Polish-Ukrainian relations, while there is no historical experience and sense of belonging to a single Church among Roman and Greek Catholics” (Polak, 1991a).

From the Ukrainian side of the border – in Lviv – a confrontation arose around restoration and honoring of the Polish memorial site, the Military Memorial in Lychakiv Cemetery in Lviv, known in the Polish collective memory as the Cemetery of Eaglets. For the Poles, restoration of the Eaglets memorial was a part of historical policy aimed at honoring those fallen in the struggle for revival of the Polish state in 1918–1920. In this reconstruction the Ukrainians saw an allusion to historical trauma, defeat and forgone craving for statehood (Khakhula, 2016, pp. 180–208).

Ideologically-driven barbaric devastation of the Cemetery of Eaglets with the Soviet bulldozers and tanks in August 25, 1971 symbolized a physical reprisal of the Polish military history and cultural heritage by the USSR leadership. Only the democratization of Ukraine allowed the Polish government and local elites to speak openly about the restoration of the memorial complex to its original (prewar) look by Rudolf Indruch.

Architectural details and texts of inscriptions on the central tomb of an unknown soldier and other sculpture and architectural compositions became subjects of controversies. The Polish side was trying to solve the conflict on two levels simultaneously: at the central level in Kyiv, and locally, in Lviv. The Polish-Ukrainian disputes were made needlessly severe by the socio-political situation in Ukraine, caused by low authority of President Leonid Kuchma and Kyiv officials in the community of Lviv. The Lviv City Council insisted that the Lychakiv Cemetery fell within its competence, while Kyiv had no right to impose its position.

The ceremonial opening of the Cemetery of Eaglets planned for May 2002 involving the presidents of Ukraine and Poland was compromised by local authorities and general public, who opposed the installation of the inscription about the “heroic defense of Lviv and the South-Eastern borderlands” by the Poles. The memorial’s problem was resolved only after the Orange Revolution, when the Polish side proposed a neutral inscription on the slab: “The grave of Polish soldier, died for the Fatherland” (“Tu leży żołnierz polski poległy za Ojczyznę”). In June 24, 2005 the opening ceremony for the Cemetery of Eaglets and the Ukrainian Galician Army Memorial was held at the Lychakiv Cemetery with the involvement of Presidents A. Kwaśniewski and V. Yushchenko, Polish and Ukrainian clergy, and the public (Ziółkowski, 2008, pp. 40–50).

While the Lviv conflict revitalized historical memory and politics over the history of all Polish society and diaspora, for the Ukrainians it was a conflict between a “provincial town on the border of its former parent state, a conflict of different canons of memory and interpretations of the past” (Lomann, 2003, p. 132). National and democratic elite of Lviv viewed the actions of the western neighbours as an attempt to impose the Polish perspective. Individual nationalistic organizations of Lviv (such as UNA-UNSO) saw chauvinism and claims for the territory of former Polish Galicia in the official stance of Warsaw. Only a minor part of Lviv intellectuals (coalesced around the periodical “Ji” (“Ї”)) was willing to engage in a dialogue and compromise with the Poles.

According to the Polish historian Robert Traba, the presence of stereotypes in the Ukrainian-Polish relations is much more noticeable than among other European nations. Prominent Polish sociologist Antonina Kłoskowska believed that in Polish democratic

society intolerance for the Ukrainians was stronger than for the Germans, and it was based on a historical background (Traba, 2001, p. 11). However, the prevalence of antagonistic beliefs in Przemyśl or Lviv reinforces the negative foundation, on which endless conflicts and disputes arise.

Throughout all the 20<sup>th</sup> century, religious, national or social conflicts dominated in the Ukrainian-Polish relations. Partially this became a continuation of traditions of previous centuries, as well as a reflection of prevalence of negative myths and stereotypes. At the same time, such aspects of relations between the Ukrainians and the Poles as common origins and cultural affinity were ignored or despised (Hud', 2011, pp. 19–34). Traditionally, the Ukrainian-Polish border was predominately the territory with many memorial sites, which represent the cultural heritage of both nations. The purpose of culture as an external sign of identity is to create new meanings and forms of communication, building mutual respect and understanding. Despite the controversial status of individual memorial sites (the Lychakiv Cemetery in Lviv, the Greek-Catholic cathedral in Przemyśl, the Ossolineum collection in the Vasyl Stefanyk Lviv National Science Library of the National Academy of Sciences of Ukraine), it remains a part of historical canons of the Poles and the Ukrainians alike. Very often excessive care over such objects causes a severe reaction of the opposite side, a reaction which results from misunderstanding of historical contexts of nations' cultural heritage origins (Khakhula, 2021).

After the postwar changes in borders, cultural values created by both nations for over a thousand years became the heritage of the Ukrainians/Poles. Thus, acceptance or rejection of world culture gives meaning to local identity, forms cultural and world outlook background for functioning of border communities. The biggest threat to the Ukrainian-Polish memorial sites is their ideological instrumentalization in favour of political interests (Syrnyk, 2022).

Thirty years of experience of cultural cooperation between democratic Ukraine and the Republic of Poland have shown that political elites understand the common background of historical and cultural heritage, and consequently mutual responsibility for its well-being and future. Poland, having developed the fundamentals of cultural policy at the beginning of the 2000s, namely in the field of preservation of cultural landmarks, started to implement several museum exhibition and restoration projects by the means of the Ministry of Culture and National Heritage. Involving experts from both countries allowed for quality restoration of the Lychakiv Cemetery, the Armenian Cathedral, and the Church of St. Peter and Paul (the former Jesuit church). Over 150 sacred and secular sites had been restored in 57 Ukrainian cities over the period of 1993 – 2014 following the initiative of such Polish institutions as Center of Polish Cultural Heritage Abroad (Kraków) and the Center of Preservation of Polish Heritage Abroad (Warsaw) (Petrus, 2020, pp. 26–43). It becomes clear that cultural memory and public consciousness of the Ukrainians and the Poles are gradually losing their conflict-inducing potential and become a platform for mutual understanding and dialogue, strengthening the civil society (Hahn, 2009, pp. 44–48).

Other joint Polish-Ukrainian initiatives are focused on museum publishing activities: scientific catalogues are being made as a result of thorough research of museums asset collections in the border areas, including those in Lviv (Kasprzak & Skoropadowa, 2008; Szablowska & Seńkiw, 2009; Chomyn, 2015a; Chomyn, 2015b). Activity of such kind is intended not only to make the museums more popular, but also to show the versatile nature of cultural heritage. Historical consciousness of the Ukrainians and the Poles, formed over the centuries-old shared history within the Commonwealth of Poland and, later, within the

Austro-Hungarian or Russian empires, is reflected in spiritual and material cultures of local border communities. Despite most landmarks being under the custody of two neighbouring states, there is an understanding of responsibility for shared cultural heritage among the Poles and the Ukrainians.

Reflecting upon the nature of inter-ethnic cultural relations, Czech polonist Roman Baron noted: “Being able to see positive values and meanings in the other nation’s culture mostly implied a *sine qua non* condition for mutual understanding and unity” (Baron, 2013, p. 7). The present-day Polish-Ukrainian border as an environment, where different identities coexist and interlace, has a powerful capacity for the creation of new quality relations, the ultimate goal of which is shared prosperity based on European values (Kalakura, 2007, pp. 401–402).

**The Conclusions.** Therefore, the analysis of intercultural relations in the Ukrainian-Polish border proves the existence of a socio-cultural phenomenon based on shared historical experience, collective memory, and negative/positive stereotypes. The Ukrainian and Polish vision of *ones of our own* and *the alien ones* in the border areas stems from a similar system of values, predominately traumatic memory about the 20<sup>th</sup> century, and tolerant perception of cultural diversity.

The modern Ukrainian and Polish border is also distinguished by existence of a conflict-inducing potential of social relations суспільних відносин, often reflected in the patterns of appropriation/destruction of cultural heritage of a neighbour nation. Severe conflicts involving the Greek-Catholic church in Przemyśl and the Cemetery of Eaglets in Lviv were the result of the Soviet suppression of historical memory, cultivation of negative stereotypes and prejudice, and immaturity of political and public elites. Positive resolve of the specified issues has allowed for closer integration of the Ukrainians and the Poles within the European system of values.

The tradition of interpersonal and inter-ethnic contacts in the context of democratization of Ukraine and Poland at the end of the 20<sup>th</sup> century gained a new impetus, reinforced by institutional activity of cultural institutes. The Ukrainian and Polish elites began to realize the importance of cultural diversity for harmonizing inter-ethnic relations, as well as necessity of preservation and restoration of shared cultural heritage. Over the last thirty years, joint Ukrainian and Polish publishing, exhibition, and restoration projects encompassed Lviv, Lutsk, Lublin, Rzeszow, Zamość, and Przemyśl. Culture managers, researchers, and cultural practices hold regular meetings dedicated to matters of preservation of cultural heritage, persistently exchanging experience, expert scientists and restorers (Chmelyk, 2017, pp. 272–278).

The verge of the 20<sup>th</sup> and 21<sup>st</sup> centuries introduced the factor of individual, communicative and culture memory to the Ukrainian-Polish intercultural dialogue. These kinds of memorization not only enrich historical experience, but also aid in comprehending the many-sided socio-political processes of today. Researchers and, partially, managers and politicians recognize the fact that “the past is not an objective reality that can be easily discovered and comprehended by a historian or an anthropologist, since there is no objective past” (Kaniowska, 2003, p. 58). Hence they understand the challenges of impossible escape from “symbolic interpretation of the past and present, where myth and history are equal” (Hastrup, 1977, p. 25).

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## РЕЦЕНЗІЇ / REVIEWS

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**WOMEN'S STORIES IN THE EVERYDAY LIFE OF UKRAINE AND GEORGIA**  
(review of the monograph: Hnydiuk O., Keburiya T., Stiazhkina O., Parunova A.  
**Women and History: Gender Dimensions of Everyday Life (the 1970s – the 1980s):**  
Kyiv-Tbilisi, 2021. 62 p.)

**ЖІНОЧІ ІСТОРІЇ У ПОВСЯКДЕННОМУ ЖИТТІ УКРАЇНИ ТА ГРУЗІЇ**  
(рецензія на монографію: Гнидюк О., Кебурія Т., Стяжкіна О., Парунова А.  
**Жінки та історія: гендерні виміри повсякденного життя (1970 – 1980-ті рр.):**  
Київ-Тбілісі, 2021. 62 с.)

As a result of the joint project of the Heinrich Böll Foundation in Kyiv and Tbilisi, a small in volume but very interesting collective monograph “Women and History: Gender Dimensions of Everyday Life (the 1970s – the 1980s)” was published. It should be stated that the title of the book has nothing to do with “a geographical clarification”, hence, an unprepared reader will not understand at once that the book is about “women’s history” in the two republics of the Soviet Union – Ukraine and Georgia.

The book consists of four chapters (articles), the authors of which are two Ukrainian and two Georgian researchers. The authors tried to answer the following questions: What was the social and economic situation of women under the state socialism in the 1970s and the 1980s?; What were the preconditions for women's economic empowerment and their involvement in the labour market?; What were the discourses of sexuality in the Brezhnev era?

Olha Hnydiuk elucidated interesting aspects of the Soviet leadership's policy on women's labour in Ukraine in Chapter I, entitled "Trade Unions are Doing a Great Job in this Direction: Labour Policy and Gender Issues of Women's Labour in Ukraine, the 1970s – the beginning of 1980s". First of all, the researcher noted accurately that emancipation was one of the main Soviet socialist promises to women. However, in the Soviet reality the lives of working women were accompanied by a double burden, the elements of the patriarchal system's society, the equality on paper and in figures rather than in family life or work, understanding motherhood as a primary social function, and prioritizing state interests over women's interests (pp. 8–9).

Due to industrialization in the USSR from the end of the 1920s to the beginning of 1930s, women began to be involved in the production massively. At the same time, the country's leadership aimed at increasing the population growth, so it put emphasis on motherhood as a social function of women. A number of measures and decrees were adopted in order to encourage women to perform their motherly duties. Hence, the Family Code of 1936 criminalized abortions and introduced financial assistance to mothers with many children. It was later decided to extend maternity leave, expanded the categories of women with children, who received social benefits, etc. (p. 9).

According to O. Hnydiuk, such kind of policy led to the formation of a "gender contract of a working mother", which meant the active women's participation in the workplace and, at the same time, gave them a leading role in taking care of children, family and household. In the 70s – the 80s of the XXth century the leadership of the USSR paid attention to the development of material and institutional support for women and motherhood (the formation of nurseries, kindergartens, etc.), which, however, contributed to increasing women's participation in the industrial production. During the period of the years of 1970 – 1985, there were approximately 50 – 52% of women in the Ukrainian SSR employed in production. According to the researcher, the decline in birth rates since the beginning of 1970s prompted the Soviet leadership to return to rhetoric that emphasized that motherhood remained the main social function of women (p. 13). As a result, the trade unions launched a campaign to transfer women from hard and harmful jobs to lighter ones. However, such measures often had the opposite effect.

Hence, O. Hnydiuk described an incident that occurred at Christmas tree decoration factories in Terebovlia, Lysychansk and Klavdiyev. The inspectorate demanded that the management of the enterprises give women, who worked as glassblowers less harmful jobs. However, the workers did not agree to it, because in the case of transferring to another position, they lost the right to additional leave, free special meals and preferential pensions, which they received working as glassblowers (p. 12). As it turned out, the attempts, which were made at the Christmas tree decoration factory to change working conditions for women failed and provoked resistance among women workers, as it could mean lower wages, loss of benefits or even jobs.

Tamar Keburiya, the Georgian researcher, wrote the second chapter "White Robe and Fur Coat: Life Trajectories of Women Metallurgists in the Era of Late Socialism". Her work

consisted of three parts: the first part elucidated changes in the social role and functions of women in the Soviet Union; the second part showed the socio-economic and cultural role of women in the 1960s and the 1980s (on the example of Georgia); the third part presented a biography of the “outstanding metallurgist” of the Soviet era Shazina Hotsiridze, through the prism of whose life the author tried to represent the forms of activity and life trajectories of women of the late socialist period in the USSR.

The researcher emphasized that during the period under analysis of the history of the Soviet society, a woman, who combined different identities at once and could be successful at work, in a social and cultural life, was considered successful. The author pointed out the factors of women’s mass involvement in heavy industry. First of all, such kind of attitude was due to the efforts made by the Soviet leadership in order to increase the share of women’s employment in the economy in general. Second of all, the presence of indiscipline at heavy industry enterprises, being absent at work and the lack of planning by men. It was believed that the “feminization” of jobs would increase productivity and the level of discipline or organization at workplace. Third of all, the post-war crisis of masculinity, the empowerment of women in society and their image as loyal and disciplined subjects of work (pp. 26–27).

A historian T. Keburiya found a certain contrast in the assignment of certain social roles to women metallurgists. Hence, in the official discourse of that time, it was emphasized that among other women the metallurgist were distinguished by “courage”, “endurance” and “bravery”. On the other hand, they were recognized as “weaker beings” and subjects, who had a sense of “maternal care”. The women’s activity of that period was also diverse and at the same time contrasting. According to the researcher, the stories of women metallurgists illustrated that they often acquired different identities, and that ability became more refined over time. That is why, the image of women’s success during that period was reduced not only to ideological purity or professionalism but also to individualism, the aspiration to satisfy material desires – therefore, there was a synthesis of these contrasting roles gradually (pp. 33–34).

Olena Stiazhkina, the Ukrainian professor in the article (chapter of the monograph) “Ukrainian Women in the Creation of the Soviet Shadow Food Market (the 1970s – the mid-1980s)” emphasized that women’s participation in illicit food trafficking in the 1970s – the first half the 1980s was a well-established practice, which, on the one hand, was the Soviet gender contract’s implementation of “a working mother” and, on the other hand, ensured the apparent rise in society’s food standards. The author analyzed the reasons for women’s participation in shadow operations, their use and / or creation of shadow food mechanisms.

O. Stiazhkina used James Millar’s concept of a “small deal” for the methodological substantiation of her research. Its essence was that in exchange for loyalty of the urban population, Brezhnev’s leadership allowed the expansion of a number of ways of small private economic activity (some of them were legal, some were in a partial shade, and some were clearly illegal) (pp. 37–38).

The researcher claims that the reasons for women’s participation in shadow food market were gender configuration of a “small deal”, which was based on the logic of the Soviet gender contract of a working mother, and gender segregation of labour market, which was stable in the 1970s – the 1980s. Analyzing archival and press materials, O. Stiazhkina provided many examples of a “small fraud” of women in the food sector of the economy (especially, setting additional prices on food, cheating when weighing products, theft in canteens, creating local artificial deficits, etc.). At the same time, she considered two examples of women’s

participation in large-scale shadow deals: the case of Kyiv restaurant “Stolychny” (1974), the abuse of Sofia Goldenberg, a director of Lviv bar “Vezha” (1980). In general, the researcher claims that some of the illegal ways to obtain money and “natural” profits was gender labelled at the food market in the second half of the XXth century. In the fourth article (Chapter), the representative of the Equality Movement Alla Parunova focused on the discourse of sexuality inherent in Georgian society during the Soviet Union during the period of Leonid Brezhnev, and tried to show its intertwining with a nationalist discourse.

The author studied the texts of “The Georgian Woman” magazine (including literary stories, short stories) mostly, on the basis of which she showed that the studied period was characterized by a stricter discipline, supervision by family or society aimed at imposing harsh sexuality on women. It, in turn, contributed to the creation of conditions for the education of traditional receptions of sexuality among Georgian women (p. 55). Among the key topos of the discourse of sexuality A. Parunova singled out the concepts of love and marriage, as well as points to silence sexuality and sex in the Georgian society.

The researcher noted that the nationalist discourse inherent in Georgia intersected with the discourse on sexuality on a number of issues. On the one hand, both discourses emphasized women's honor and decency, and on the other hand, nationalist discourse gave one of the central roles to the Georgian mother and thus gave her the status of “a guardian of the nation” (p. 61). In nationalist discourse the notions of “motherhood” were closely intertwined with issues of “morality” and “purity”, which were associated with a female sexuality inevitably (p. 62).

Taking everything into account, we should note the novelty of methodological approaches of researchers, who resorted to the practice of discursive analysis and used modern scientific concepts. Interesting studies carried out by four authors from Ukraine and Georgia showed us new pages in the history of the Soviet women in the 1960s and 1970s, depicted the interpretation of women in society, political power discourse, national traditions and, at the same time, demonstrated her new social identities, career trajectories, management and a personal life. Nevertheless, reading the book leaves the impression of a fragmentary nature of the problem, unspoken, as the scholars left out the issues of educational, cultural roles of women, family practices, age, and etc. The study of a female sexuality is incomplete, as well as its manifestations, awareness and representation during the period under analysis. However, we believe that the authors will be still able to take a more comprehensive approach to understanding the declared issues.

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**SUBJECTIVITY AS A STATE OF SELF-CREATION OF IDENTITY  
AND CIVILIZING FATE OF UKRAINE (review of the monograph  
by S. I. Pyrozkhov and N. V. Khamitov. Civilizational Subjectivity of Ukraine: from  
Potentials to a New Worldview and Human Existence. Kyiv: Naukova dumka, 2020. 255 p.)**

**СУБ'ЄКТНІСТЬ ЯК СТАН САМОТВОРЕННЯ ІДЕНТИЧНОСТІ  
ТА ЦИВІЛІЗАЦІЙОЇ ДОЛІ УКРАЇНИ (рецензія на монографію: С. І. Пирожков,  
Н. В. Хамітова. Цивілізаційна суб'єктність України: від потенцій  
до нового світогляду і буття людини. Київ: Наукова думка, 2020. 255 с.)**

The events of the first decades of the XXIst century affirm the subjectivity of Ukraine, pave the way for it to make its civilizational choice. According to S. I. Pyrozkhov (2017), it is a fateful choice of Ukraine as intention to implement its own, rather than externally imposed development strategies. And it's not just about choosing a geopolitical place in the world, avoiding the threat of becoming an object of geopolitics, but, above all, about choosing "a paradigm and strategies for self-development, which can be interpreted as a real national idea" (Pyrozkhov, 2017, p. 30). These and other current issues are covered in a number of

works of the section of social sciences and humanities of the National Academy of Sciences of Ukraine.

The monograph under review (Pyrozhkov, 2020) is a continuation of research by the Ukrainian scholars on the preconditions, state and prospects of the implementation of a new stage of civilizational development of Ukraine, as well as identifying possible threats to the Ukrainian state and national identity. Important is the key thesis that history knows many cases when giving different peoples common features of civilization was forced: “In the XXIst century, such coercion is not only unacceptable but also impossible. Civilizational changes in modern countries, especially in polyethnic ones, must take place on the basis of *a social dialogue and consensus* – they mean *the civilizational choice* made by the government, the elite and the people. This civilizational choice fully applies to Ukraine as well” (Pyrozhkov, 2020, p. 5).

The monograph “Civilizational Subjectivity of Ukraine: from Potentials to a New Worldview and Human Existence” thoroughly elucidates the process of civilizational subjectivity formation of Ukraine, at different stages of which our country decides its own civilization destiny, chooses identity and partners. In this process, as the authors of the monograph rightly point out, a productive civilizational choice is possible only if the people of the country are really consolidated. It is noted that responsibility for the choice of civilization should be assumed not only by the government, politicians, statesmen and public figures, but also by the majority of citizens. Events in Ukraine and the world confirm the main feature of the state subjectivity – the people are the source not only of power in the country, but also its subjectivity. The Ukrainian people create their own identity, courageously and sacrificially determine their civilizational destiny. Under conditions of the Russian aggression, the unity of power and people showed a high level of the national consolidation, worthy of astonishment and admiration in the world. In our opinion, one of the main achievements of the study of S. Pyrozhkov and N. Khamitov is the development of an effective methodology for understanding the progress of the country as the subject of history and geopolitics. In the analysis of such categories as “subjectivity”, “humanistic subjectivity”, “civilizational subject”, “national idea”, “worldview dimension of subjectivity”, “noosphere civilization”, “human-centrism”, “potentialism”, “meta-anthropological potentialism”, “people”, “political nation”, “modern Ukrainian nation”, “independence of the country”, “federalization”, “identity”, “limitrophy” the authors elucidate the humanistic, anthropocentric quality of Ukraine’s subjectivity, integrating developments in the field of social philosophy, philosophy of history, political philosophy, philosophy of education, etc.

We agree with the authors’ conclusion, who note that such methodology, firstly, should be potentialism – a way to develop real capabilities of the country in all dimensions of civilization, and secondly, to direct the country’s development in humanization direction – to be anthropologically oriented. Based on the outlined methodology of meta-anthropological potentialism, researchers emphasize the importance of this principle: “In order to become a full-fledged subject of international politics and civilized life, the country must be guided by internal factors, and not be subject to external influences, obviously, it should be noted that subjectivity must first be given to its citizens” (p. 38).

In the monograph it is convincingly proved that “civilizational subjectivity of Ukraine is such quality of its social existence, when it is not the object of influence of the “powers of this world”, and by the efforts of its political, scientific, artistic and religious elite it constructs its own civilizational future, way of life, values and national interests” (p. 331). In the development of subjectivity, Ukraine must rely primarily on its own strengths and potentials,

construction and implementation of its own civilization project. Therefore, the authors place a clear emphasis on the need to consolidate society within the country and development of breakthrough areas of basic science and development of original technologies on this basis.

According to the researchers, the subjectivity is weakened by the fact that “we have a constant oscillation between humanism and authoritarianism, and passion and conformism caused by internal factors, as well as a stable crisis caused mainly by external factors” (p. 338). The threat to the establishment of Ukraine’s subjectivity is a neo-feudal oligarchic social existence, authoritarian consciousness and subconsciousness of its political elite.

Reflecting on the ways of spiritual and cultural subjectivity development of Ukraine, researchers emphasize that the national idea as a choice of paradigm and strategies for self-development is of critical importance to the establishment of civilization. However, the authors emphasize that it is not just about “a set of images and values nurtured by the historical experience of statehood and the culture of memory, but also about the internal polylogue among different strata of society, national and confessional groups, in which the conventional symbolic dictionary of nation-building is born” (p. 301).

Indeed, according to many researchers, a national idea can succeed not when it is elaborated by ideologues artificially, but when it is the result of objective factors interaction of life of the country and people – economic and political relations of social groups and segments of the population, culture and history of people, their desire for independence, democracy, prosperity.

The authors’ conclusion on the role of philosophy in the civilizational subjectivity development of Ukraine is important. It is philosophy that is able to actualize the worldview structures common to the community, including values. In our opinion, the monograph focuses on the extremely important problem of humanity. After all, the society and the state must not forget that for the preservation and realization of a human existence are relevant not only philosophically oriented worldview, but also such components of a human spirituality as religion and its theoretical expression – theology. “It is within the framework of a religiously coloured worldview”, the authors note, “the idea of focusing on peaceful and equal relations between states on the basis of such value ideals as power, justice and love arises” (p. 42).

Historical retrospective of the researched issue, carried out by the authors of the monograph (Chapter 2. State Projects in the Light of Historical Traditions of Ukrainian subjectivity), is topical and extremely necessary, which confirms mentally inherent in the Ukrainian community humanistic potential in the quest to become a full-fledged subject of the world civilization system.

Researchers are right to believe that the Soviet historiography did much to level the continuity of the historical process in Ukraine and to remove the Ukrainian history from the European context. However, the authors identify at least three “outbreaks” in the history of civilization of Ukraine, which are important historical milestones of the Ukrainian statehood and civilization choice and caused this situation nowadays – these are the periods of Kievan Rus; the Cossack state; the Ukrainian Revolution of 1917 – 1921 (p. 25).

The authors of the monograph focused their research on the phenomenon of the Ukrainian Cossacks: “It is the presence of the Cossacks that added some specificity to the Ukrainian history, without understanding of which it is hardly possible to explain the complex vicissitudes of the historical path of our people” (p. 94). Owing to the Cossacks, it was possible to develop national socio-political structures and maintain them for centuries despite the raging imperial pressure.

The general conclusion of the researchers is important – the emergence of the Cossack ethnocultural complex in the Ukrainian historiography is associated with the greatest transformations in the history of both the Ukrainian Etnos and Ukraine as a socio-political organism. It is not just a border strip, but *a special country that formed the border of European civilization* (our italics. – The authors' note), separating it from the Great Eastern Steppe (Pyrozshkov, 2020, p. 95).

The formation of the civilizational subjectivity of Ukraine during the National Revolution of the mid-XVIIth century, according to Ya. V. Vermenych, in its historical significance, is not inferior to many cardinal events in the life of Europe (Pyrozshkov, 2020, p. 104). Therefore, understanding its socio-political role in the fate of Ukraine can still help us answer the question: What is the impetus for national revival? When and how do modern nations emerge? What lessons from the dramatic history of Ukraine have we learned?

In search of answers to these and other questions, the authors of the peer-reviewed monograph emphasize that independence is easier to gain than to maintain; there is possibility of unpredictability of the results of revolutions for those, who start them (revolutions raise to the surface of a political life such problems that their leaders can not always cope with); from “democracy without borders” people get tired quickly and then they look for another, firmer government (Pyrozshkov, 2020, p. 111). There is no doubt about the topicality of these lessons in our time.

Turning to the history of Ukraine, the authors of the monograph emphasize, firstly, that the socio-cultural scene of Ukrainianness as a subject of European and world history has long been defined as a borderline, more precisely, the frontline position, which often happened and was accepted as a crossroads of civilization; secondly, on the imbalance of the pace of national history, which during different periods, stages and epochs underwent the attraction of several civilizational complexes.

The last feature highlights the problem of identity, which cannot be avoided when thinking about the civilizational subjectivity of Ukraine. One cannot but agree with the authors' conclusion that in order to understand the Ukrainian project as a whole, the historical view of the national identity acquires great importance – not so much as the sum of inherent features of a certain society, but as the process of acquiring the ability of the Ukrainians to “self-expression” and self-identification, the formation and defense of the national subjectivity.

Analyzing the state projects proposed by the authors of the monograph in the light of the historical traditions of the Ukrainian subjectivity, we update what was said by M. I. Mykhalchenko (2016) about, that modern Ukraine has its own prehistory and new history, which fits perfectly into a general trend of a human development, although they have an expressed specificity.

We are aware of a simple and clear truth: Ukraine has never aspired to be the subject of a special historical mission and has never insisted on its uniqueness. It wants to be a democratic European state in which people can live with dignity, with guaranteed rights and freedoms.

In this regard, the authors of the monograph emphasize the need for a new security system. They emphasize that national security exists for the preservation and development of a civilizational subjectivity of the country, and the latter – for free self-realization of citizens, and the authors warn that changing such worldview of meanings and values can lead to dehumanization of subjectivity, the revival of dangerous manifestations of authoritarianism and the loss of both subjectivity and security.

Also, according to the researchers, the civilizational subjectivity of Ukraine depends on solving a number of problems related to multiculturalism and border control, which

are inherent in many modern societies. It is mentioned one of the main tasks of Ukraine is to overcome limitations of its position in the economy, politics, public and individual consciousness. According to the conclusion of M. I. Mykhalchenko (2016), Ukraine as a regional civilization is a limitroph in three senses: “In geopolitical terms, it is really between NATO and Russia. In economic terms, it is between countries with a predominantly market, socially oriented Western economy and Russia’s chaotic economy. In the spiritual and moral – between the totalitarian, mono-ideological uncertain past, which functions as a social utopia of a multiparty, legal, democratic state ...” (Mykhalchenko, 2016, p. 377).

In the context of these statements, we can agree with the authors of the peer-reviewed monograph that one of the options for asserting the subjectivity of Ukraine may be its acquisition of the status of an influential regional geopolitical center, which will make it impossible to continue the struggle for it among the leaders of opposing civilizations and to secure for it the status of an object and not a subject of global geopolitics.

Therefore, the issue of an interfaith confrontation in Ukraine, which the authors of the monograph emphasize, remains important nowadays. Overcoming the contradictions in the relationship between civilization and religion will be a difficult challenge on the path to a civilizational subjectivity. Moreover, these problems are extremely specific and worthy of the most in-depth and comprehensive research. In Europe and Ukraine acute debates continue to revolve around values and identities based on religious beliefs and feelings.

Drawing on the conclusions of the peer-reviewed monograph concerning nowadays, we conclude that only existence of a civilizational subjectivity can guarantee the state a real sovereignty. And nowadays, under conditions of war with the Russian Federation, geopolitically Ukraine acquires the humanistic quality of a civilizational subjectivity, the source of which is the unity of power and people.

The Ukrainian people, losing people’s lives, are defending their freedom and independence, the right to choose their own future for civilization. After all, the strength of the Ukrainian state is to live freely in more than a thousand-year tradition.

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## NOTES

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